

Version

7

PERFORMANCE SOFTWARE

a division of Kim Crenshaw Enterprises, LLC

Training School Professional. Management Software

PERFORMANCE SOFTWARE, A DIVISION OF
KIM CRENSHAW ENTERPRISES, LLC

Training School Professional

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Getting Started with Training School Professional

A. MAJOR DIVISIONS

Before adding data, take a few minutes to customize your pull-down menus and review how the database is set up



- Customer Records
- Rosters
- Class Information
- Dog Records
- Clubs/Dog Organizations
- Veterinary Records
- Administration

The main switchboard is displayed when the database is opened. It shows the seven major areas where your data is stored. You will quickly become adept at knowing where to look for information you seek. You may also refer to the outline in the manual or the menu bar at the top, which also indicates each major section.

Article II. Outline of Information

Article III.

CUSTOMER RECORDS

Customer Information

(with Contacts and Dogs)

Prospects to Call Back

Lists

Current & Former Students and other lists
in various groupings

E-mail Lists

Events Lists

Labels

Current & Former Students, Instructors,
Club Members and various other
groups

ROSTER INFORMATION

Rosters for current, upcoming and graduated
classes

Daily schedule of private lessons

Daily schedule of grooming

Graduation Certificates

CLASS INFORMATION

Details on classes; past, present and future

Enrollment records sorted by class

Instructor information

Retention rates

Schedules

DOG RECORDS

Search dog records by breed or dog's name

Update dog's titles

Edit breed list

CLUBS/DOG ORGANIZATIONS

VETERINARY RECORDS

Manage lists of veterinarians and clinics

List of expired veterinary forms

Mailing labels for veterinary clinics

ADMINISTRATION

Set Name of Your School

Business Contacts

Clubs and Dog Related Businesses

Customize Pull-Down Menus

Cities, Goals, States

Marketing Information

Customize Referral Fields

Referral summaries

Link to Mailing Labels

Import and Export Data

Purge Software of Sample Data

General Tips

(a) USING TAB TO NAVIGATE THROUGH EACH FIELD ON A WINDOW OR FORM

The software has been developed for speed, and keyboard access is faster than using a mouse. Therefore, all of the button selection windows and all of the forms operate on a “**TAB**” system. You may use your mouse instead, if you prefer, but using the **TAB** keys, or **ARROW** keys, will significantly speed up your data entry.

(b) ID CODES

The entire Training School Professional software is built around calling up and managing your client’s data based on their ID code. While you may choose an alternate format, we strongly recommend you follow our example and use codes based on the first four letters of the client’s last name followed by the first three letters of the first name, in all caps. All of the fields where the ID code appears have been sized and formatted for this method. Using this system, the client named Kim Crenshaw would have an ID code of CRENKIM. The client named Karen Peterlin has an ID code of PETEKAR. The ID code is unique for each client. Therefore if you have a client named John Smith and a client named Johanna Smithson, you will need to modify at least one of them. For instance, you can have SMITJOH1 and SMITJOH2. We usually assign the #1 suffix to the most current client, as that is the code that will be listed first on all the pull-down menus. Make certain that you, and everyone who is using the program, understands how to select ID codes. Typographical errors in ID codes can create havoc with client records. Either you will end up with duplicate sets – one under each name – or half the client’s records will be under one code and half under another. This can be rectified using the Modify/Delete Customer ID form, but it is best to avoid the problem altogether.

(c) NAVIGATION THROUGH THE PROGRAM

As you close a button selection window, you will be returned to the previous window, eventually taking you back to the Main Switchboard. From there, you can access any area of the program. For instance, if you are in the Administration area and desire to go to Veterinary Records, simply close the Administration window. As that is a main section accessed from the Main Switchboard, you will be returned to the Main Switchboard. From there you may enter the Veterinary Records. Anytime you want to return to a previous area, or an entirely different area, simply close the window(s) you are using until you return to the window desired or to the main switchboard.

(d) STATUS BARS

Throughout the program, you will be advised of the location of your cursor as well as what is required or recommended for that field by use of the Status Bar at the extreme lower left of your monitor, directly above your computer’s “start” button. If you ever get “lost”, please refer to that Status bar for assistance.

(e) SAVING CHANGES

You need never worry about saving your data. The program is designed to do an auto-save each time you move from one record to the next or close a form. Therefore, the most information you can lose at one time is the current record on which you were working if the power should go out or the system otherwise breaks down.

(f) IMPORTING EXISTING DATA

Any data that exists in or can be imported into a Microsoft Office 97, 2002 or 2003 product can be imported into the Training School Professional. There is a built-in import feature in the software to aid in the import. See last section of this manual for details.

(g) BACKING UP DATA

We strongly recommend performing regular saves of your data file. If you use your program daily, it is best to back it up daily to a CD. You can use one CD for even days and one for odd to ensure you always have a reasonably current version available. You do not need to back up the entire program. All of your data is located in a separate file in the C:\OTCH folder. The file which contains your data is named "DATA.MDB".

(h) CLOSING FORMS & REPORTS;
MAXIMIZING & MINIMIZING

The program will maximize most reports to full-screen. In some windows you can simply pull its sides to resize if desired. You also have the option to size forms and reports to your liking by using Windows. In the three grey boxes at the upper right of your monitor, the "-" will minimize - in effect hiding the object; the square or double squares in the middle will either restore or maximize; and the X in the far right will close the object. In addition, there are "CLOSE" buttons on most forms. If there is a "CLOSE" button available, it is recommended you use that as opposed to the Windows X-box option, as there may be some operating procedures that occur when you use the CLOSE button that will keep your data updated, safe and your system operating quickly.

SPEED TIP TO REMEMBER:

All of the button selection forms are set up to operate with either the TAB keys for those who are keyboard handy, or you can use your mouse to click and activate any button. Using TABs is significantly faster, and the entire database has been designed with that functionality in mind.

(i) PRINTING

All rosters, forms and reports are designed to print with your default printer. Most margins are set to ½ inch all around, except label. Labels are designed to print on Avery 5160, 1' x 2³/₈". In the mailing label set-up, there is a potential warning you may get if you are using a printer that does not support the margins used. In case of that warning, which would indicate some material may exceed the printable area, you can simply tell the computer that you do want to continue and it should go ahead and print fine.

You can either use the **CONTROL-P** method of bringing up your print dialog box or you can use the built in **PRINT** buttons. Where available, we highly recommend using the **PRINT** buttons in the software, such as on the rosters, as they prevent excessive printing of unwanted pages. The Customer

Information records are also designed to print single mailing labels using a label printer, such as a Seiko or Dymo Labelwriter. If you do not have a label printer attached, that feature will obviously not function. If you mail out high volumes of individual pieces of mail, you may consider purchasing a label printer for this purpose.

(j) CLOSING THE PROGRAM

As you **CLOSE** each button selection form, you will be successively brought back to the Main Switchboard. It is strongly recommended you use this method of closing the program, rather than using the Windows X-box method, as there is a compression feature built-in to the **CLOSE DATABASE** button which will keep your program manageable.

Understanding Relational Databases

Because the Training School Professional program is a relational database, much of the information is tied to, depends upon and/or is related to other information. This is good for you as the manager, because anywhere you update a client's information it will be updated everywhere else in the program. A change of address, for example, is easily performed through the Customer Records section and the changes made there will appear on all lists, rosters, labels, or any report that is run subsequent to the update.

One reason why relational databases are so popular is the ease in which information can be updated in many places by only changing it in one. Yet therein also lies the danger. If you overwrite "good" information with "bad", the changes will appear everywhere in your system. For instance, if someone accidentally begins entering Client #2's address in Client #1's record, Client #1's data has been changed irrevocably once the field has been exited. This is another reason why we strongly recommend daily backups, or even back-ups between sessions, until your staff becomes familiar with the program.

The Training School Professional program has some safeguards built in to it which take a little time up front to get used to, but will help ensure that all of your clients' data appears on the rosters for which it was intended and on the proper lists as they change from prospective to current to former students. Reading the manual and following the steps to customize your database will help you understand how the program works and enable you to fully tap into its powerful information managing features.

Administration



On the Main Switchboard, choose **ADMINISTRATION**, either by using your mouse or by **TABBING** until you reach the Administration button. All button keys will activate with a keyboard stroke of **ENTER**. Tab to skip; **ENTER** to activate. Check the status bar in the lower



left of your computer screen if you're not sure.

SETTING YOUR SCHOOL NAME

When you set your school name in the administration section the name will appear as you type it on all rosters and certificates as well as in the main window of the Training School Professional software.

1. Open the Administration window. Click on the “**SET SCHOOL NAME**” button.
2. Highlight the existing text and replace it with your school's name.
3. Close the form by using the “X” in the upper right hand side of the window.

LINKING YOUR LOGO

You will want to replace the sample logo we have included with the logo for your school. The space available for the logo on the certificates and rosters is roughly square. You will want to convert any existing logo into a square format. The actual size does not matter, as it will “stretch” to fit, but if it is not square to begin with it will not appear properly.

Once you have a logo for your school that is roughly square, save it in a GIF format with the name “logo.gif” and place it in the C://OTCH folder, replacing the sample logo that was automatically installed with the software. The logo must be saved with that name in that format, as the software looks for it before opening. Although the software will function without a logo at all, it will create “warnings” to you that it cannot find the logo if it is not in the folder.

1. Create a logo for your school that is roughly square
2. Save the logo as a “.gif” file with the name “logo”.
3. Place the “logo.gif” file in the C://OTCH folder, overwriting the sample logo that was installed with the software.

CUSTOMIZING PULL-DOWN MENUS

A pull-down menu is a field which gives you choices. This increases data entry time, as the program tries to match what you are typing. Often times you only need type the first letter of the word to pull up a match. With a pull-down menu, you can also make a selection by using the arrow to the right of the field box, which will then drop down the list of choices. Some pull-down menus are limited to the list, and in some you will be able to enter information other in addition to the choices on the list. In the example shown, the “CITIES” field contains two cities. If we type “C” we will get Cincinnati and if we type “H” we will get Hamilton. We recommend you go to the Administration area of the program and add the cities in which most of your clients live to speed your data entry.

Upon entering the Administration area, either use your mouse or **TAB** to the “CITIES” button under List Options.

In the **CITIES** Table, you can enter as many cities as you normally encounter. You can select and delete the existing cities by clicking on the small grey box to the left of a city, followed by **BACKSPACE** or **DELETE**.

While you are in the Administration area, review the **GOALS**. These will appear in the pull-down list under your client’s dogs to indicate their goals for their training. You may make modifications to these just as with the **CITIES**.

Open the **STATES** table and add the states with which you are likely to come in contact. The pull-down menus, their locations, and the area of modification are listed in the table below. We recommend you review the pull-down lists below and make desired modifications to the fields highlighted in yellow, which are accessed via the Administration and Veterinary areas, prior to customer and dog data entry.

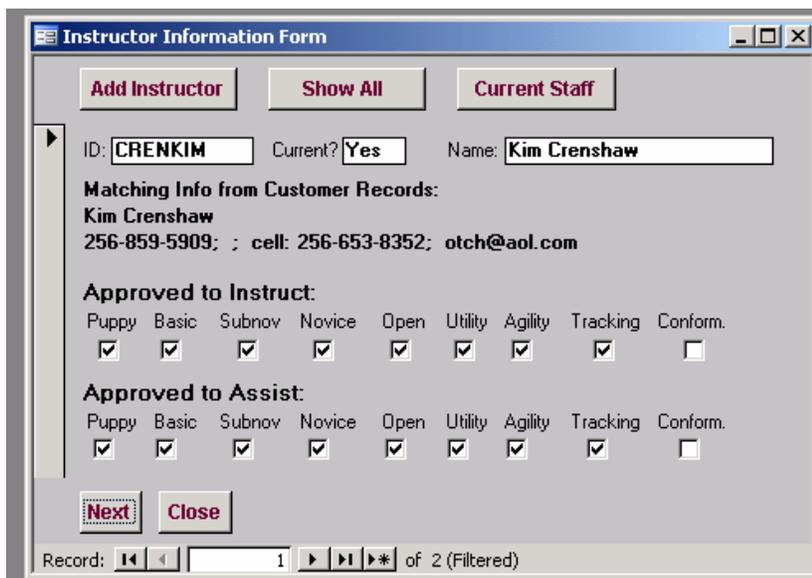
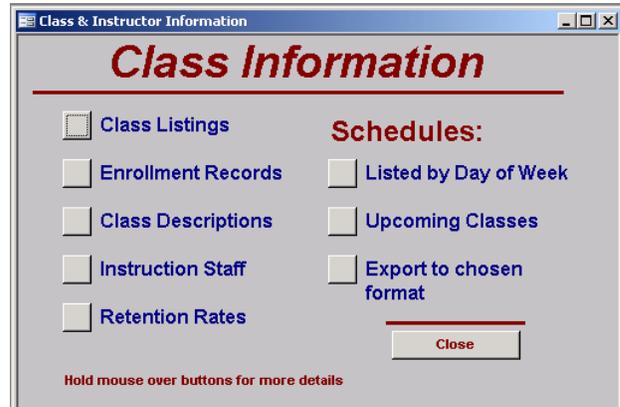
PULL-DOWN MENUS WHICH CAN BE MODIFIED:		
NAME OF FIELD	LOCATION	MODIFICATION VIA
Customer ID	Customer Forms	Modify using the pull-down
Cities	Customer Information Form	Administration
State	Customer Information Form	Administration
Goals	Dog Information Details	Administration
Primary Referrals	Customer Information; Marketing tab	Administration
Secondary Referrals	Customer Information; Marketing tab	Administration
Contact Types	Customer Information; Contact tab	Administration
Breed	Customer Info: Dog Info Dog Information Form	Administration
Goals	Dog Information Form	Administration
Veterinarian	Dog Information Form	Veterinary
Veterinary Clinic	Dog Information Form	Veterinary
Class ID	Training Records Forms	Class Information: Add/View

Managing Classes and Instructors

One safeguard to ensure your client's training records show up on the correct rosters is built in to the Training Record forms. In order to add a training record for a client, there must be an existing class. Therefore, the first order of business in setting up the Training School Professional to manage your class information is to enter the information concerning your instruction staff and your existing and scheduled future classes.

ADDING INSTRUCTORS

You do not have to "add" instructors to add classes. However, doing so is what ensures their names and phone numbers appear on your rosters.



In the Class Information section, **TAB** over to Instructors and Assistants, or choose it with your mouse.

When you open the Instructor Information window you will see the sample data that has been added. Later you may want to change the Sample Instructors' status to "No" in the **CURRENT?** field so it does not continue to be included in your staff list, but for now you should leave them as they are in order to best view the sample reports we have included.

Notice that the ID code for the instructors is formatted as described earlier in the manual, with the first four letters of the last name, followed by the first three letters of the first name, in all capitals.

Use your mouse to click on **ADD INSTRUCTOR** to enter your staff.

Enter the **INSTRUCTOR'S ID CODE** (which will be the same as you enter on their Customer Information Record); **TAB** to the **CURRENT?** field and enter "Yes". **TAB** to the **NAME** field and enter the name of your instructor the way they prefer it to appear on the roster. This may be different than what is on their Customer Record, as they may prefer a shortened first name or nickname. Click the boxes you wish. Go to **ADD INSTRUCTOR** when you are finished with this record to add another. Close the Instructor Information window when you are done.

Organizing Class Information

Class information is organized in very specific ways in the program. This is what enables the program to give you lists of current and former students grouped by levels of training, to print rosters, graduation certificates and to produce schedules. Organizing your data before you begin entering it will assist you in making full use of this powerful feature.

CLASS DIVISIONS

Class information is divided based on the “Classification” code. Base and Monthly classes are the most commonly used for regular group classes. Clinics and seminars are periodic or one-time events. Boarding, Boarding/Training, Day Care, Grooming and Private Lessons are printed by the day.:

1. **BASE CLASSES.** Class code = B. Classes that have a set start and finish date. At our school, these typically include Puppy, Basic, Intermediate obedience classes as well as Basic and Intermediate Agility. Any class that is designated as a “six week”, “eight week” or otherwise has a concrete time span falls into this category.
2. **MONTHLY CLASSES.** Class Code = A. Classes that run continuously. At our school, these typically include the Novice, Open and Utility obedience classes and competition level Agility classes. However, if your school’s Novice, Open, Utility and competition level Agility classes have definite start and finish dates, you should enter those classes as Base Classes.
3. **CLINICS.** Class code = C. Clinics are typically one day training sessions, perhaps only several hours in length. At our school, these were typically when we had a special event, such as visiting instructor, who taught a one-time or monthly session. For instance, if you had a two hour session once a month concerning “Puppy Introduction” or Housebreaking or some other topic oriented class, you would probably want this listed as a Clinic. You may have several clinics back to back in one day with different attendees and different topics.
4. **SEMINARS.** Class code = S. Seminars are typically full day or even multiple day sessions in which you have handlers attending all the session of that event. For instance, if your school brings in a speaker who holds a two-day event that runs all day both days, it would be listed as a seminar.
5. **PRIVATE LESSONS.** Class code = P.
6. **GROOMING.** Class code = G.
7. **DAY CARE and BOARDING.** Class code = D.
8. **BOARDING w/ TRAINING.** Class code = T.

CLASS LEVELS

In addition to the four major class divisions, you need to decide what “level” to assign to each class. This is your choice, and it will determine how the information about the class appears on the schedule. This is usually a shortened version of the course name. For instance, Puppy Development may be referred to as “Puppy” level. Basic Training would be “Basic”, etc. In the Class Descriptions section, you will be able to expand the title of the course to whatever you like, but in the Class Information, it should be as short as possible. The program will organize your classes based on your Divisions and your Levels. The software cannot distinguish between “Basic” obedience and “Basic” Agility, so make sure that each different flavor of class has it’s own unique level. For instance, at our school, we used Basic for Basic Obedience, and Agil-Basic to indicate a Basic Agility course. You may want to take a few moments to write down on paper the levels you intend to use and which classes fall under those categories. This written list will assist you in adding the full details in Class Descriptions as well as help you organize your data.

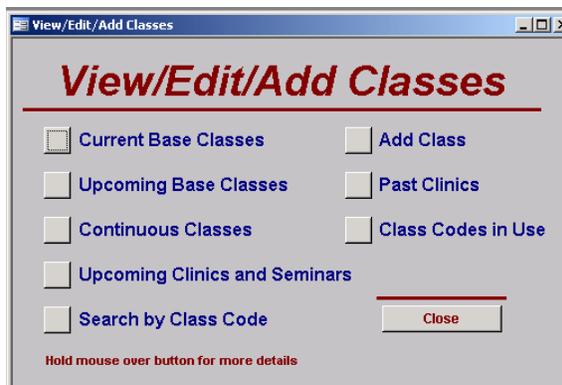
ENTERING YOUR CLASSES



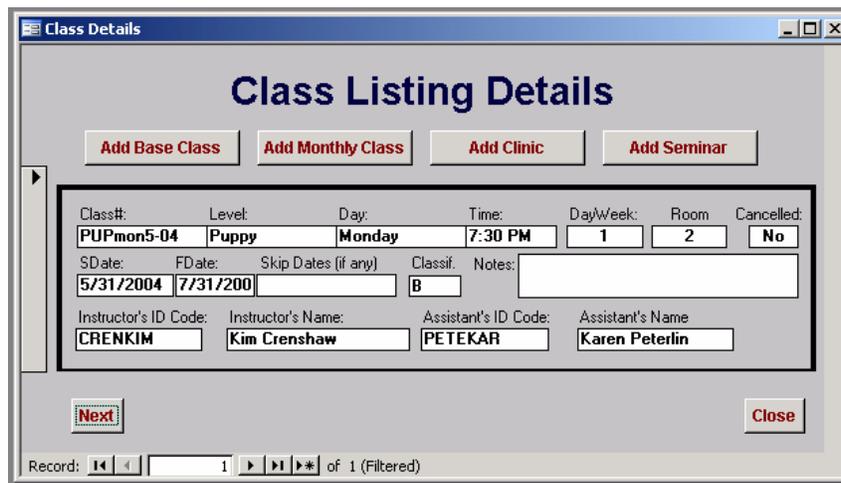
In the View/Edit/Add Classes window, you will have a variety of choices. You would normally enter a new class using the “Add Class button, but if you are coming to this area for the first time, take a look at the Upcoming Base Classes area to review the sample data. You can add classes directly from most of the available windows.

When you have organized your class information as described above, you are ready to begin entering the classes into your program.

Within the Class Information Window, use the arrow keys, tab key or mouse, enter the Class Listings area. This is where you will enter, review and/or modify all of your class information.



The Class Listing Details window which opens when you **CLICK** or **ENTER** Current Base Classes is the same window that is opened with most of the button choices shown on the View/Edit/Add Classes window. The difference between these windows is what data records are included. In Upcoming Base Classes, the records shown are those which have been designated as a “Base” class by virtue of the “B” that is show the **CLASSIF.** Field and then sorted by date to include only those class that have a start date equal to or in the future of the current date.



You can navigate between the records using the **NEXT** button or clicking on the arrow symbols directly to the left and right of the record numbers at the bottom left of the window. To add a record, use the buttons at the top, as they will automatically classify your new class based on your choice.

(k) CLASS ID CODE

Consistency in the way you designate **CLASS ID** codes is important. You want to choose a method that is easy to remember and easy for your other staff to remember as well. The uniqueness of “key codes” is an integral part of how relational databases function. Remember that each class code must be unique. If you ever have a problem entering a class code - if the computer tells you it will not accept the code because it is already in use - go back to the Class Information window and view the **CLASS CODES IN USE**. You will be able to see the class code in question and can decide if you want to modify the old class or if you want to choose a new one. Keep in mind that the class codes are tied to all of the enrollment records for that class, so you certainly do not want to “delete” an old class code or you would lose the enrollment records for the dogs in that class. However, you can modify the old code

(l) BASE CLASS ID CODES

Using the example data of a Puppy Development Class, we have assigned the first three all capital letters as “PUP”, which designate the level of class, the second three lower case letters as “mon”, indicating the day of the week and the remaining numerals as “5-04”, which represent the start date. You will probably not have two Puppy classes starting on a Monday night in the month of May 2004, so this becomes an easy-to-remember way of coding that avoids duplicates. In the event that you did have two classes of the same level on the same day of the week starting in the same month you could follow the date notations as A or B depending on which started first or which occurred in the first time slot. We do not recommend using the actual start date in the code, because months from now when you want to look something up you probably not remember the start dates of every class off the top of your head. The designation method described above has proved to be the most effective.

Another example of the system for assigning Class ID codes: a Basic class starting in March, 2004 on a Tuesday night would be BEGTues3-04.

Listed below are some common abbreviations of various class code circumstances for Base Classes.:

Class ID Code	Level	Day of Week	Start Date
PUPmon5-04	Puppy Development	Mondays	May, 2004
BEGtues3-04	Basic Training	Tuesdays	March, 2004
INTthur4-04	Intermediate/Subnovice	Thursdays	April, 2004
AGSat6-04	Agility, Basic	Saturdays	June, 2004
AGIsat6-04	Agility, Intermediate	Saturdays	June 2004
AGAsat6-04	Agility, Advanced	Saturdays	June, 2004

(m)

(n) MONTHLY CLASS ID CODES

If you offer Monthly Classes (those classes which have no start or stop date but run continually), those codes would differ slightly. In that case we would denote the first three all capital letters to indicate the level, (such as NOV to indicate Novice), the middle three to indicate the day of the week (mon, for example) and the following numerals either indicating the time slot or left off entirely. So a Novice class offered on Monday nights at 6:15 could have a Class ID code of NOVmon6:15 or, even more simply, NOVmon. Unless you have more than one Novice class on a Monday night, there would be no need to add the time designation.

All classes designated as “A” and “not” cancelled will show up in your Monthly Class list as well as on the Monthly rosters. If, at some point you no longer offer the Monthly class on that night, you can simply mark it as “cancelled” and it will not longer appear. If you want to “re-activate” a previously cancelled advanced class, simply Search by Code to pull up the record and change it from “yes” to “no” in the Cancelled field. For example: let’s say you used to offer a Saturday Novice class which was cancelled for the Summer, and in the Winter you decide to offer the class again. You cannot “add” the class as a new record, because that class code already exists. To reactivate it, you will simply change it back and make whatever modifications are necessary (such as instructor) to update it.

(o) LEVEL

Using our previous sample, after we add the ID code for our new class we tab to the **LEVEL** field. We recommend these denotations be brief, yet understandable, and logical. Therefore, we use Puppy for a Puppy Development Course, Basic for Basic Training, Intermediate, Subnovice, Agility-Basic, etc. What you type in this field will be displayed on the class rosters and also will be tied in to the class listing descriptions.

(p) DAY

Day on which class is held. We spell it out, as it will appear on the roster the way you type it here. Remember to be consistent in how you list it, whether abbreviated or spelled out – the classes will be grouped by this field on your Schedules by Day of Week.

(q) ROOM

Some training facilities have more than one training room available for their use or perhaps even more than one location. The **ROOM** field is used to designate this information. In your “Classes by Day of Week” report, records will be sorted by this field. The default entry is “1”, so no changes are needed if you use only one training area and you may skip this field entirely in that case. If, for example, your facility has one indoor training area and an outdoor training area that are in use at the same time, you

would use “1” for the indoor area and “2” for the outdoor area. You will find this feature to be very helpful if you have multiple training areas when you print out Schedules and classes by day of week.

(r) CANCELLED

The default entry is “no”, so you need only be concerned with this field if you have a class listed that you have cancelled and no longer wish it to appear in the Upcoming Class rosters, records or reports. Changing the field to “yes” will drop the class listing from all future lists and rosters. If you want to “re-activate” a previously cancelled advanced class so that it shows back up on the lists and rosters, simply Search by Code to pull up the record and change it from “yes” to “no” in the Cancelled field..

DATES

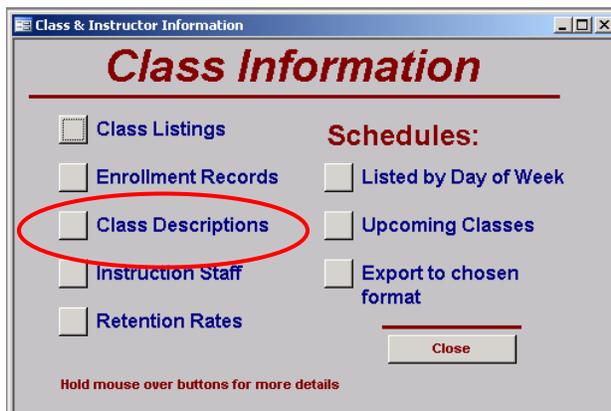
SDATE (starting date), **FDATE** (graduation date) and **SKIP DATES** (dates the classes will not be held). Enter appropriate data. The program sorts and lists your data into rosters for “future”, “current” or “graduated” based on these dates, so it is important they are not left blank and that they are correct. If you find you have to unexpectedly “skip” a date, such as happens in severe weather, you will want to go back and modify your graduation dates for the affected classes.

(s) CLASSIF.

The classifications were outlined earlier in the manual under Organizing Class Information. (B=Base; A=Monthly; C=Clinic; S=Seminar; S=Grooming; B=Boarding and Day Care; P=Private Lesson; T=Boarding w/Training). If you used the buttons included with the software to add your class, it already defaulted to the correct designation. However, it is always best to check. The CLASSIF field should not be left blank. If the CLASSIF field is left blank, the class information, along with those enrolled in the class, will not show up on any roster or schedule.

(t) STAFF INFORMATION

The Instructor Code should match the instructor’s Customer ID code. Their name should be written exactly as they prefer it on the roster. The same format applies to adding the assistant.



CLASS DESCRIPTIONS.

Class descriptions are accessible through the Class Information window. If you plan to print schedules using the program, you should add details for all of the levels your school offers. This information will appear on schedules that are printed using the Training School Professional software.

Order	Level	Name	Cost	Per	Desc
1	Puppy	Puppy Development Course	\$60.00	6 week course	Designed for young puppies, 10 weeks thru 4 months. Introduction to training.
2	Basic	Basic Training Course	\$80.00	8 week course	Home manners, problem solving and foundation class for additional advanced training
5	Utility	Obedience Competition: Utility	\$25.00	per month	Preparation for the Utility level of Obedience Competition. Prerequisite: CDX or instructor's permission
6	Agility-Beginner	Beginning Agility Course	\$80.00	8 week course	
7	Event	Special Events	\$0.00		Special Events; Agility Clinics and Obedience Seminars; call the school for details

The **ORDER** field in the Class Description Table determines the order in which each level is grouped on the schedules. For instance, your school may prefer to print the class schedules with the most introductory obedience classes first, followed by subsequently more advanced classes, followed by agility or other special classes. Use the order field to indicate the order in which you want the classes listed on the Upcoming Schedules. The “**ORDER**” field must remain unique. Therefore, there can only be one level of classes assigned to each number. For instance, you cannot designate both Puppy and Basic to be (#1). Therefore, if you decide to change the order later, you may need to temporarily assign a higher number, which has not yet been used, in order to switch them. It is typically best if you can plan out ahead of time the order you prefer on your schedules to avoid having to change it later.

The **LEVEL** field should match the **LEVEL** field on the Class Information forms. This is how the program knows to group the classes on the lists. Therefore, it is important you remain consistent in how you name **LEVELS**. For example, make if “Basic” is how you are going to designate the Beginning Obedience class level, you use that designation for all classes of that level. If you have some classes denoted as “Basic” and some that are “Beginner”, those classes will not be grouped properly on the schedules. We recommend using Basic, for the simple reason that it has fewer characters, making it easier to type and faster for the computer to sort.

Another reason the **LEVEL** field should match the **LEVEL** field on the Class Information forms is for the Graduation and Attendance Certificates. The **NAME** field in the Class Description is what will be printed on your Certificates, so that is what should be more “formal”. For instance, you may use “Intermediate” as a designation for the intermediate obedience class for the purposes of defining the level, both on the Class Information form and also on the Class Description form. “Intermediate” is what shows up on your rosters. However, you may prefer that the Graduation Certificates show the student has graduated from “Intermediate Obedience”, and that is what you enter in the **NAME** field of the Class Description area.

The information other than **ORDER** on the Class Descriptions table is easy to modify at any time so you may either enter it now or skip it and come back to it.

Adding Customer Information

Now that you have added the class information and the instructors, modified your pull-down fields with the common cities, states, and veterinarians that you are likely to come in contact with, you are ready to experience the full speed and power of the Training School Professional software.



The Customer Records section is where you will do most of your data entry. Once your clients are entered, you can sort their records in a variety of ways. You can e-mail certain groups of students, or send postcards to Puppy graduates letting them know of an upcoming Basic class. Let's get started.

OVERVIEW OF CUSTOMER RECORDS

Customer Information – Main Form: This form contains the customer information, records of contacts your staff has had with them, and records pertaining to their dogs. You can access any part of a customers records through this form.

Customer Information – Address/Phone: This is an abbreviated version of the main form, and contains the basic contact information for the client. Because it is not tied with the contact records and dog records it opens a little faster, so it would be useful to you if are using a slower computer and all you need is a phone number.

Prospects: This form displays those clients who have inquired about class but have not yet enrolled.

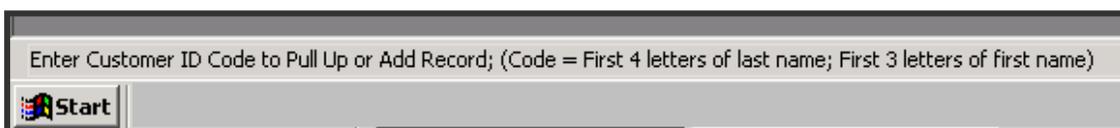
Lists: Includes student lists of many kinds as well as e-mail lists.

Labels: A range of mailing labels

Delete/Change Customer ID: A tool to change a Customer ID (as in the case of a misspelling) or to delete a Customer ID.

KEEPING TRACK OF YOUR CURSOR:

If you ever wonder where your cursor is located, look to the extreme lower left of your monitor. Just above your computer's **START** button you will see the **STATUS BAR** for the Training School Professional software. It indicates where you are located in a form and can also provide tips on what to do in the field. For instance, in the sample below you see the **STATUS BAR** for the **CUSTOMER ID** field, directions on how to proceed and a reminder on how to choose a Customer ID Code.



Customer Information: Main Form

Customer Information Form

Close [] To Display or Add Customer: Click On Arrow in Box at Left; Scroll Down or Type ID#; Enter

Customer Information: Mailing Label

Marketing Lists Notes Details

Student? Yes
Status: Current
Marketing :

First Middle Last
Address:
Phone(s); Day: Evening:
Fax/Other: E-mail:

Contact Information:

Date: Contact Type: Action Requested: Given/Mailed Info:
04-Feb-04
Attempts: Date Sent:
Returned Call: DO NOT REMOVE OR MODIFY THIS CLIENT!
Contact With:
Level:
Preference:
Follow-Up:

Dogs: Add Dog
Dog's Details: Training Rcrds:
Enroll: Class: Groom, Priv, Brd:

Record: 1 of 1

Record: 1 of 8

Customer Info Main Form

When you first open the Customer Information - Main Form, you will see what appears to be a blank record. Notice, however, that the **CLIENT ID** is set to "." and the dog's name is "?". This is not an accident. Notice also that the **STUDENT** field "yes" and the **STATUS** is "Current".

This is your "dummy" client and you can use this client and dog to produce blank lines on rosters. This is useful when you want to print a roster for an upcoming class to allow your staff to "pencil in" students and need blank entries on the roster to do that.

The seemingly blank record also performs other uses: Its existence helps protect the privacy of whoever would otherwise be first; and it prevents folks from inadvertently changing that "first" client's information when they do not know how to properly operate the database. Overtyping existing information is one of the easiest ways to irrevocably delete your client's data, and having a blank first client record will help protect your clients' data from staff who may not be computer savvy.

ID PULL-DOWN FIELD:

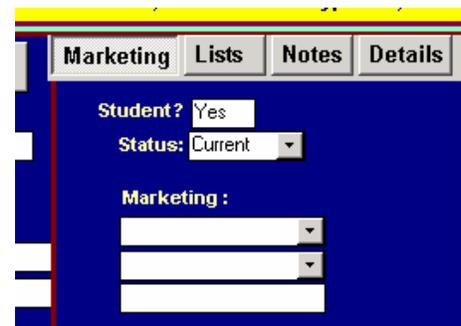
When you first open the Customer Information form, your cursor will be at the **CUSTOMER ID** field. There are two ways to access information in this field. If you are trying to access an existing customer, you can use your mouse to pull down the arrow key at the right of the field box and scroll down the list of ID codes, selecting the correct one with your mouse.

The preferred way to select a Customer ID is to simply begin typing the Customer's ID code. The software will make an attempt to match the ID code, starting with the first letter. Continue typing until you either get a match (existing client) or until you have entered the ID code. When you **TAB** out of the field the software will either pull up the matching customer information or will ask you if you want to add a new Customer. Use **TAB** and **ENTER** to answer that question; Answer "no" if you are trying to access a client that you know to be in the system, and "yes" if you want to add a client.



TAB to the next field.

When you **TAB** out of the **CUSTOMER ID** field, you will be taken to the Marketing section of the form. **TAB** again to go to the first field, which is the answer to whether or not the client is a student. Answer "yes" if they are or ever have been enrolled; answer "no" if they have not yet been an active student at your school. If you are logging registrations for a student, then they are a student and you would answer "yes". Please note that the answer to this question will classify your client as either a "prospect" or a "student". **TAB** to leave the field.



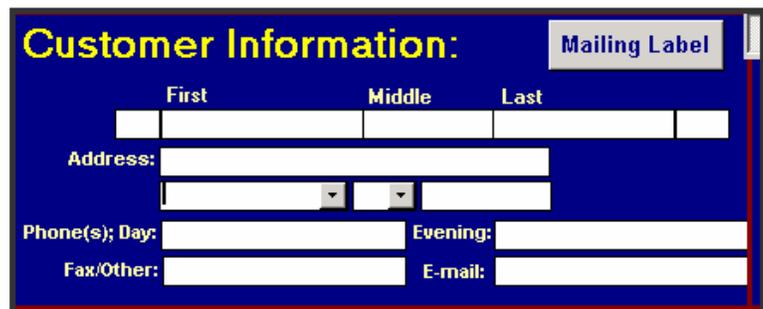
The **STATUS** of your client is also important. Only "current" students appear on rosters.

The default values of the two student status fields are "No" and "Prospect" respectively.

When you **TAB** out of the **STATUS** field, you will go to the first **MARKETING** field. This is where you enter where your client heard about your school, if you know that information. If you want to leave it blank, you may skip the field by **TABBING**, or you can choose from the pull-down list. You can change the contents of the list through the Administration control window. The first **MARKETING** field is for general referrals, such as Veterinarian, or Advertising, whereas the second one is more specific, such as "Dr. Combs" or "yellow pages". These fields can help assess your marketing strategies.

TABBING out of the second **MARKETING** field will take you to the Customer data entry section.

The first box is the **FIRST NAME** of your client. (check the status bar). Tabbing after entering the first name will take you to the **MIDDLE NAME** field and then to the **LAST NAME** field. The **PREFIX** and **SUFFIX FIELDS** are programmed to be skipped using the **TAB** keys, as they are not commonly used, but you may access them using your mouse if you desire.



The **ADDRESS** and **PHONE** fields are self explanatory. The **CITY** and **STATE** fields are pull-down fields whose content is in your control via the Administration area. When using any pull down field you need only begin typing to start the matching process and may **TAB** out of the field when the computer finds the match. There is no need to continue to type after a match has been found. You may also use the mouse if you prefer, but that is significantly slower.

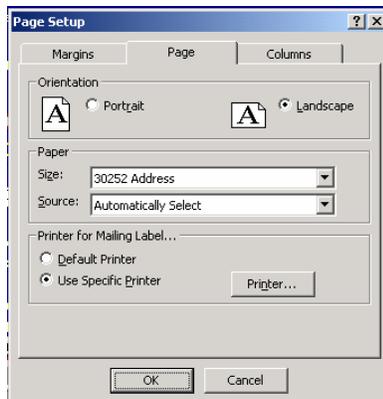
Remember that you **TAB** to skip any field, so if you do not have a fax or other number for your client, you may skip the field by **TABBING** to the next one.

When you **TAB** out of the **E-MAIL** address field, you will be taken to the Contact Records for the client you just entered.

MULTIPLE HANDLERS IN THE SAME HOUSEHOLD

Occasionally you will have more than one handler in the same family. This could be a husband/wife pair or perhaps a parent/child. You will also have children handlers. In these cases, you will probably choose not to duplicate the address, phone number and other information but to combine their records. You will have to choose which party will have the **ID** for the family. Often we will choose the “main” handler. If one party had started training prior to another or the adult if the handler is a child. For instance: Lauren Doe, who is a child handler, will actually be listed under her mother’s record, Jane Doe, with an **ID** of DOEJAN. The reason being it is most likely the mother that will be the one to call you on the phone. In the **FIRST NAME** portion of the customer record you would enter “Jane/Lauren”, and that is what will appear on the roster. With a husband/wife team, we also put both names divided by a slash in the **FIRST NAME** field. In the event that the husband and wife have different last names, we list the names as follows: **FIRST NAME**: “Jane Doe/” ; **LAST NAME**: “John Smith”, which results in “Jane Doe/John Smith” on the roster.

Printing Single Mailing Labels

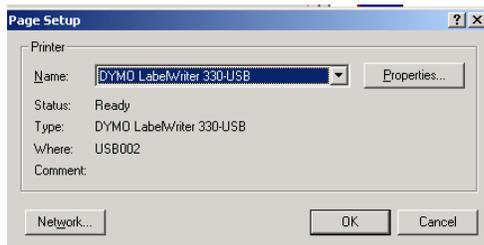


It is easy to print a single mailing label through the main CUSTOMER INFORMATION form. This is very useful when you want to mail a prospective client an information package or perhaps mail a student who has missed class their homework sheets.

Clicking on the button titled “Mailing Label” on the Customer Information form will pull up the mailing label interface. We have our label interface defaulted to use the Dymo LabelWriter 330. However, you should be able to use this feature with any single-label printer you desire.

The following directions are to set up your printer the first time.

Thereafter you will only need use the “print” button to produce a label.

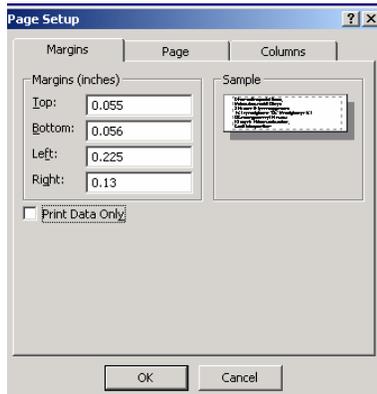


- ❑ After installing your printer, access the mailing label interface by clicking on the Mailing Label button on the Customer Information form.

- ❑ Go to “FILE” and PAGE SETUP.

- ❑ Select the PAGE tab.

- ❑ On the lower left side, under the “Printer for Mailing Label” line, check “Use Specific Printer”.



- ❑ Click on the PRINTER button.

- ❑ Click on the down arrow bar next to your main printer’s name to show all available printers on your system. Choose the label printer desired (ie: Dymo LabelWriter 330). Click OK to close that window.

- ❑ Back in the first PAGE SETUP window, choose the MARGINS tab. Change the margins appropriately for the label printer being used. For the Dymo LabelWriter 300, use: Top: .055; Bottom: .0056; Left: .225; Right: .13. If you are not sure what margins will work with your printer, enter 0, 0, 0, 0 and it should default to the smallest acceptable margin.

Contact Information

The first field in the Contact Information is the **DATE**. The default is the current date, so if you are logging that day's information, you may **TAB** to go to the next field. If you are logging Contacts from a previous day, you need to change it to match the date of the Customer Contact. The date field will default to the current year. Therefore, most of the time, you need only type the month and day, such as "2-11" for February 11th. The software will fill in the rest for you. In January, when logging contacts from December, you will need to remember to add the date – otherwise those contacts will be logged as December of the next year!

The next field in the Contact Information form is the **CONTACT TYPE**. This pertains to how the client came to contact the school. Choose from the pull-down list. Once you become familiar with the choices, listed in the example, you can simply start typing and the list will fill in the rest for you. **TAB** to leave. Modify the list of choices through the Administration section.

The **ACTION REQUESTED** field records what the customer wants you to do. Most times it is mailing an information package on your services. If they have left a message, they may want you to call as well as mail information. They may to be "penciled in" for an upcoming class. Choose from the pull-down list. As you become familiar with the choices, you can simply be typing to activate the matching feature.

The next field, **GIVEN/MAILED INFO**, records what information was mailed or given. Special refers to literature such as Housebreaking information that is not normally part of your school's information package. **TAB** to go to the next field.

Other fields are:

DATE SENT: What date the information was sent or given.

ATTEMPTS: Attempts at contacting the client. Use notations such as LM 2-11 to denote that you left them a message on 2-11 or NA 2-11 to denote that there was no answer.

RETURNED CALL: Date the clients call was returned;

CONTACT WITH: Name of staff member who spoke with client

LEVEL: What level of training the client is requesting.

PREFERENCE: The time or day of week the client needs, if they have limitations.

COMMENTS: Add any details here you wish. Recommendations include noting problems the owner is having or any special circumstances that may affect his training.

FOLLOW-UP: If there was a follow-up on this contact, log date here.

LOGGING DOG INFORMATION

When you are finished logging the Customer's contact information, use your mouse to enter the dog information area. To add new dog, you can either highlight the "?" in the **DOG NAME** field or click on the small red and blue button just under the "D" in Dog.

If you have clicked on the red and blue **ADD RECORD** button, your cursor will go to the Dog's Name field and will highlight the question mark. Type in the new dog's name. **TAB** to go to the next field.

The fields on this form are, in tab order:

DOG'S NAME: Enter dog's name as you want it to appear on the roster.

BREED: Choose from pull-down list. You may add or modify breeds through the Dog Records section.

SEX: enter M or F

DATE OF BIRTH: We recommend estimating a dog's date of birth rather than putting their age. The reason being that a dog who is 4 months old today will certainly not be 4 months old when you look at this record three months from now. To ensure that the information you enter is not time sensitive, estimate the month of birth if possible. This field is flexible in format and accept a date, a month & year, or just a year if that's all you know. We try to estimate. For instance, if a client tells us his dog is six months old in March 2004, we will enter 9-03 in this field. When the registration form comes in, we can update with more accurate information.

From the Dog Information section you can either enter or view **DETAILS** on the dog, such as veterinary records, titles earned, or you can **ADD TR** to add a Training Record or **LOOK-UP TRAINING RECORDS** directly from this form. You can also add grooming, private lesson and boarding/training records here as well. Use your mouse to activate those buttons or to exit the Dog Information area and go to "Dog Details".

Logging a Registration Form

A copy of a registration form which corresponds nicely with the Training School Professional software is included on your CD.

The checklist for logging a registration form includes:

- ❑ Ensure the class for which the client is registering has been entered.
- ❑ Log the client's information, taking care to change the **STUDENT** field to "Yes" and the **STATUS** field to "Current".

- ❑ Add a Contact Record for the client saying that a Training Record has been added. (optional, but highly recommended). The small amount of time it takes to add the contact record will pay off later when you are looking up client information. A sample of a Contact filled out with enrollment information is shown.

- ❑ Log the Dog's Information
- ❑ Add details for the dog, such as shot records & goals, etc. by using the **DETAILS** button on the Dog Information section of the Customer Main record. (Optional).
- ❑ Use the Add TR button on the Dog Information section of the Customer Main record or from the Dog Details form to add a Training Record for the class.

DOG DETAILS

When you enter the dog details area, your cursor will be on the **NEUTERED** field. Enter "yes" or "no" or **TAB** to skip.

The editable fields are:

NEUTERED

GOALS. Choose from pull-down list. Edit pull-down list through Administration.

VET: Choose from pull-down list or type name of vet. Add vets to list through Veterinary section. We recommend using the last name first formatting and adding all area vets before adding records to lessen data entry time.

CLINIC: Name of the Veterinary clinic. Pull-down list editable through the Veterinary Section

RABIES, DHLPP, BORDETELLA, CORONO: Dates of vaccinations. Tab to skip.

HEARTWORM: date tested or type of medication the dog is taking.

REGISTRATION: Registration information for the dog.

BITTEN HUMAN & BITTEN DOG: These boxes will show up on the roster; use them to alert your staff when they may be dealing with a potentially aggressive dog.

Use **MEMO BOXES** to write yourself and your staff notes about the dog's biting history or on the dog's personality. You might note here that the dog is exceedingly shy and perhaps has been abused. This information would then be available to instructors in the future. This information does not show up on the roster.

When you click on **DECEASED OR NO LONGER OWNS**, the dog will drop to the bottom of the list of dogs for that client. This can be especially useful for clients that have multiple dogs, as only three are visible without having to scroll down.

TRANSFERRING A DOG TO NEW CLIENT

Occasionally you will need to transfer the dog to a new client. Perhaps they sold it or gave it away. In that case, you will bring up the old client's record. Enter the Dog Information area and go to "Dog Details". You will see a pink shaded field near the top left area of the form that shows the Customer ID.

To transfer the dog to the new owner, simply:

1. Add the new customer to your records.
2. Go to the previous dog's owner's records and access the dog's details.
3. Highlight the **CUSTOMER ID** field and type in the dog's new owner's ID.

All of the dog's training records and other information will automatically be transferred to the new owner.

ADDING TRAINING RECORDS THROUGH THE DOG DETAILS (VIA CUSTOMER RECORDS)

The nice thing about adding a new training record by going through the Dog Details is that your client's ID code and the dog's name will be added for you and your cursor will be on the **CLASS ID** field, ready to add the class.

Enter the **CLASS ID#**. If you are using the recommended method, you should not have to worry about forgetting. For instance, a Puppy class starting on a Monday night in May 2004 would be PUPmon5-04.

The screenshot shows a software window titled "Training Record" with a sub-header "Training Records". It features several input fields and buttons. At the top, there are buttons for "Print", "Next", and "Close", along with a "HAS CUSTOMER PAID?" dropdown set to "Yes" and a "Red # (Auto)" field. The main form includes:

- Student ID: CRENKIM
- Student? MUST BE YES: []
- Dog's Name: Flash
- Class ID #: []
- CLASS Status: Current
- Classification: []
- Goals/Problems: []
- Attendance: 1-8 grid with checkboxes
- Graduated?: []

 A legend for Classification codes is provided: P=Puppy, C=Competition, PC=Possible Competition, E=Experienced, R=Repeat, P/C=Puppy/Competition.

You do not have to worry about remembering the exact start dates, as they are not part of the Class ID code. In addition, the pull-down list has a list of future classes as well as those which have started recently, up to two weeks prior to the entry date. You may also enter an existing Class ID code even if it does not appear on the pull-down list. If you have entered an acceptable Class ID Code, the corresponding information for the class will appear directly under the field as you **TAB** out of the field.

CLASS STATUS: It is imperative this field is set to "Current". The field is set to default to "Current" when using an "add TR" button. Only students designated as Current show up on the roster.

CLASSIFICATION: You may leave this blank, or you may prefer to "tag" certain students. The suggestions shown on the form are standard codes that we use to let our instructors know they have a client with specific goals. You may use any one or two letters here. This field is included on the rosters.

The **GOALS/PROBLEMS** memo field is where you will enter any such information gathered from the client's registration form. This information does not show up on the roster.

The next **TAB** will take you to the **PAYMENT** box. Indicate if the client has paid for the class. If you check "yes" for payment, the Payment Record form will open and will automatically set the Client ID, and the Class#. You can then log the client's payment information if you choose. Close if you don't want to enter it at that time. There is more information on logging payments in the chapter on Financial Information.

Note that when using the **TAB** key you will skip the **INDIVIDUAL START & FINISH DATES**. Those fields are only needed if you are dealing with a monthly (on-going)

class. When the client is enrolled in a "Base" class, which has definite start and end dates, the **INDIVIDUAL START** and **END** dates are not needed. If the client is enrolled in an on-going class, however, the

The screenshot shows a software window titled "Payment Form" with a sub-header "Payment". It contains the following fields and controls:

- Date: 1/18/2005
- Customer ID: CRENKIM Kim Crenshaw
- Payment is for: BEGnow
- Amount: \$0.00
- Method of Payment: []
- Check #: []
- Name on Check: []
- Notes or Comments: []
- Checkboxes: Dues, ClassPmt
- Buttons: Close, [] (arrow), [] (print), Click to Delete Current Record

INDIVIDUAL DATES are of utmost importance. Only the students who have a start date will be added to the roster. If the client has an end date listed, the student will be dropped from any rosters which are printed after the recorded end date. Therefore, to “drop” an advanced student from a monthly class, simply use your mouse to click in the field and enter the last date they attended class in the **ADVANCED FINISH DATE** field and the client will be dropped from any rosters printed after that date.

The example shown is a Training Record for a Current Monthly student. Notice that the **STUDENT STATUS** is “Yes” and the **CUSTOMER STATUS** is “Current”. Notice that the **CLASS STATUS** is also “Current”. The **INDIVIDUAL START DATE** is recorded and the **ENDING DATE** for the students’ enrollment in the class is left null. Therefore, the student is “current” and will appear on the Monthly rosters on the roster for Monday Utility at 6:15 p.m.

The screenshot shows a window titled "Training Records" with a red header. Below the header are buttons for "Print", "Next", and "Close", and a "HAS CUSTOMER PAID?" dropdown set to "Yes". The form contains the following information:

- Student ID: CRENKIM, Kim Crenshaw
- Student? MUST BE YES: Yes, Current
- Dog's Name: Willow, Labrador Retriever: F; 6-6-99, Neutered?: yes
- Biter?: Human: , Dog:
- Class ID #: Utility, Utility; Monday, thru, 6:15 PM, Instructors: Karen Peterlin;
- CLASS Status: Current, ONLY CURRENT MAKES ROSTER!
- Individual Start/End Dates (Advanced): 1/1/2004 thru
- Classification: C (P=Puppy, C=Competition, PC=Possible Competition, E=Experienced, R=Repeat, P/C=Puppy/Competition)
- Goals/ Problems: (empty field)
- # Attended:
- Graduated?:
- Attendance: A grid with 8 columns (1-8) and 1 row. Column 1 is checked.

At the bottom, it says "Record: 1 of 1 (Filtered)".

ADDING ENROLLMENT RECORDS DIRECTLY:

You do not have to go through the client’s records to add enrollment records. In order to view, modify, delete or add a record directly:

- Go to Class Listing
- Go to “View Enrollment Records” and enter the class code at the prompt.
The existing enrollment records, if any, will be pulled up.
- Use the “▶” symbol along the bottom scrolling record selector to go to view each existing record.
- Use the “▶*” symbol along the bottom scrolling record selector to go to a new blank record
Enter the customer’s ID code in the Customer ID field;
TAB and enter the dog’s name in the Dog Name field.
Enter the Class ID code in the proper field.

You have now added the client and the dog to the roster.

The disadvantage to adding enrollment records directly is that you lose the opportunity to add a corresponding Contact Record for the client. However, if you are in a hurry and all the dogs are already logged into the system, it can be a quick way to create a roster.

CHANGING INFORMATION ON AN ENROLLMENT RECORD:

Occasionally you may find a need to change information on an enrollment record.

- Accidentally added the wrong dog and need to change the dog
- the client was added to the wrong roster.
- the client's schedule changed prior to the start of class and they wish to be transferred to another class.

To directly change information on an enrollment record:

- Pull up the enrollment record you wish to modify, either by going through the client's records or by:
 - Go to Class Listing
 - Go to "View Enrollment Records" and enter the class code at the prompt.
 - The existing enrollment records, if any, will be pulled up.
 - Use the "▶" symbol along the bottom scrolling record selector to go to view each existing record until you are viewing the record you wish to modify.
- Use your "TAB" key or your mouse to place your cursor in the field you wish to modify and select the existing contents of the field.
- Type in the correct data.
- "TAB" to exit the field and save the changes. The record has now been modified. If you were changing a dog's name, you should see the correlating information (such as breed) has been changed. If you were changing the class in which the client is enrolled you should see the correlation information for the modified class.

We do not recommend direct changes for clients who are transferring classes after having attended, as the previous training record will be lost.

DELETING AN ENROLLMENT RECORD:

Occasionally you will want to delete an enrollment record.

- A client never started the class
- There were duplicate enrollment records entered.

To delete an enrollment record:

- Pull up the enrollment record you wish to delete, either by going through the client's records or by:
 - Go to Class Listing
 - Go to "View Enrollment Records" and enter the class code at the prompt.
 - The existing enrollment records, if any, will be displayed.
 - Use the "▶" symbol along the bottom scrolling record selector to go to view each existing record until you are viewing the record you wish to delete.
 - Use your mouse to click on the grey bar that runs vertically on the left side of the record to select the record.
 - Use the "DELETE" key on your keyboard
- You will be asked to confirm that you intend to delete the record.

We do not recommend deleting enrollment records for clients who are transferring, dropping, or taking a break from training as their previous training record information will be lost.

Grooming, Private Lessons, Boarding, Boarding/Training and Day Care

Some services are issued on a day-to-day basis. These include grooming, private lessons, doggie day care, boarding and boarding with training services.

If your business utilizes any of these services the new Version 5 features address these as follows:

ADD THE SERVICES YOU OFFER:

Through the Class Listings, add the services you offer as you would a regular group class. Use the following “Classification Codes”:

- Private Lessons: P
- Boarding w/Training: T
- Regular Boarding D
- Day Care D
- Grooming G

The use of the above codes will ensure your lists appear on the services form and that the records appear on your daily list.

Records for the above individual services may be added through the Customer Information form, either directly on that form by clicking appropriate button in the Dog section or through the Dog Details subform. Shown is a sample of the entry form pulled up when either of those buttons is activated.

The screenshot shows a software window titled "Boarding & Grooming Records" with a sub-header "Boarding, Private Training, Grooming". The interface includes several input fields and buttons:

- Buttons:** Print, Close, and a right-pointing arrow.
- Amount Quoted:** \$0.00
- PD?**
- Red #** 74
- Student ID:** CRENKIM, Kim Crenshaw
- Student?** Yes Current
- Dog's Name:** Flash, Sheltie; M; 10-9-01
- Biter?:** Human: Dog:
- Service Requested:** Latest Rabies: 11/24/2003; Latest Parvo: 11/24/2003; Other: tested 11-24-03; Neutered?: Yes
- Service Selection:** Priv-W dropdown, P button, Private Lessons text box, Time: 2:00 PM
- Webb Anderson** (likely a name or ID)
- Start Date:** Wednesday, March 02, 2005 thru []
- Level:** []
- Training Goals and Problems:** none
- Grooming Instructions:** []
- Medical:** []
- Special Food Instructions:** []

Class Rosters

All of the information you have so diligently input comes to fruition with the production of the Class Roster. Changes in the client's phone or address, or changes or updates to the dog's information, automatically pass through to all forms and reports.

You can access the Roster Information from the Main Switchboard.

Rosters are set to print 10 students on the title page. If you have classes with more than 10 students it will print a second page you can attach to the first or print on the back.



The grey scroll bars and buttons will not show up on the printed roster.

It is recommended you use the print button to print the roster, which will print one copy of the selected roster. If you use the "Cntrl-P" feature on your computer you may inadvertently print a copy of each roster in the set you are viewing. If you do use the "Cntrl-P" method, be sure and instruct your printer to print only the page you are currently viewing.

*You can check all the Training Records for a class prior to printing the roster by going to **CLASS INFORMATION**, then to **VIEW ENROLLMENT RECORDS**.*

ROSTERS FOR CONTINUOUS CLASSES

MONTHLY ROSTERS are for those classes which continue indefinitely, although the students may vary. These are classes with no start and end dates and the students usually stay enrolled until they title at that level or otherwise move out of the class. In the class listings, they are tagged as "A".



Your School Name Here

Next Close

July

2004

Print Date: 5/25/2004

\$25 per month; limit 4

Utility

Karen Peterlin
883-1020; ; cell: 714-5106; karenpeterlin@aol.com

Utility

Monday

6:15 PM

Software Licensed to: YOUR SCHOOL NAME HERE
© Copyright 1994-2004 Kim Crenshaw

Cust ID	Handler Info	Dog Info	1	2	3	4	5	Shots	PD	Start Date (this class)	Phone Numbers
CRENKIM	Kim Crenshaw P.O. Box 1274; Huntsville 35807-0274	Willow CDX AX MXJ F Labrador Retriever						R: P: B:		1/1/2004	Day: 256-859-5909 ; Evening: cell: 256-653-8352 ; otch@aol.com
*								R: P: B:			Day: ; Evening: ;

Selecting the date and year

In the example of the Monthly Roster, we have selected July by either typing “Jul” in the field in which the cursor is located upon opening the report, or you can use the mouse to pull down the grey arrow key and select the correct month. The year defaults to the current year, so you will likely not have to worry about it, except perhaps when you are printing January’s rosters in the month of December. If you click in the field you will be able to type the year you prefer. The grey bars will not appear on the printed roster.

Attributes of those client records which appear on the monthly rosters:

- The dog has a training record for the correct class.
- The Customer’s Status is “Current”.
- The Class Status on the Training Record for the class must be “Current”.
- The student has an “individual start date” on the training record for that class.
- The “individual end date” field on the training record for that class is blank.

In the sample Training Record, notice there is a start date for the student, but the end date has been left blank.

Training Records

Print Next Close HAS CUSTOMER PAID? Yes Red # 1

Student ID: CRENKIM Kim Crenshaw
Student? MUST BE YES! Yes Current CUSTOMER Status (Only Current Makes Roster!) Change on main form.
Dog's Name: Willow Labrador Retriever; F; 6-6-99 Neutered?: yes
Biter?: Human: Dog: Latest Rabies: ; Latest Parvo: ; Other:
Class ID #: Utility Utility; Monday
thru 6:15 PM Instructors: Karen Peterlin,
CLASS Status: Current ONLY CURRENT MAKES ROSTER! Individual Start/End Dates (Advanced):
01-01-04 thru
Classification: C P=Puppy, C=Competition, PC=Possible Competition, E=Experienced, R=Repeat, P/C=Puppy/Competition,
Goals/Problems: # Attended? Graduated?
Attendance
1/2/3/4/5/6/7/8

Record: 1 of 1 (Filtered)

To drop a student from a monthly class:

1. Change the CLASS STATUS to something other than “Current”.
2. Put the ending date of the student’s enrollment in the “Individual Start/End Dates”.

It is also recommended that you add a Contact Record under the student’s customer records to indicate that they have dropped or graduated from the class.

If a student does not appear on a Monthly Roster:

The problem could very well be that the student lacks a “start” date for that class, or perhaps an “end date” has already been entered. See the troubleshooting section for more information on this topic.

Clients are listed on the Monthly rosters by the date they began that class, with the “older” students at the top of the roster.

BASE ROSTERS

CURRENT BASE rosters are for classes that are in session at the time: having a start date prior to the current date and an end date in the future. In the class listings, they are tagged as “B”.

FUTURE BASE classes are those base classes (“B”), which have not yet started, according to the listed start date.



**Basic
Tuesday
6:15 PM**

Class:
BEGnow

Instructors:
Kim Crenshaw
line: 256-859-5909; cell: 256-653-8352; otch@aol.com

Karen Peterlin
883-1020; karenpeterlin@aol.com

Start Date: 5/31/2004
Graduation Date: 12/31/2005
Skips Dates:

First Name	Last Name	Codes (See Reg.)	Sex	Breed	Born	1	2	3	4	5	6	7	8	Shot Records:	PD/G	Phone Numbers:	
Kim Crenshaw		C <input type="checkbox"/> D <input type="checkbox"/> H	M	Flash	10-9-01	<input type="checkbox"/>	R: 11/24/2003 P: 11/24/2003	<input checked="" type="checkbox"/>	<input type="checkbox"/>	D: line: 256-859-5909; E: cell: 256-653-8352; otch@aol.com							
Current Student		<input type="checkbox"/> D <input type="checkbox"/> H	M	Current Basic	10-02	<input type="checkbox"/>	R: P:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	D: 555-555-1212; E: 555-555-1212; otch@aol.com							
		<input type="checkbox"/> D <input type="checkbox"/> H				<input type="checkbox"/>	R: P:	<input type="checkbox"/>	<input type="checkbox"/>	D: ; E:							

The roster is interactive, and you may update information, such as log shot records, change the name of the dog, check attendance and record a payment. When you click on the “paid” box, the Payment Record form will appear. If you do not wish to log the payment information at that time, simply close the window.

student’s Training Record, as the dates are fixed by the start and end dates of the class itself.

The roster is interactive, and you may update information, such as log shot records, change the name of the dog, check attendance and record a payment. When you click on the “paid” box, the Payment Record form will appear. If you do not wish to log the payment information at that time, simply close the window.



Your School Name Here

Class:
BEGnow

Start Date: 5/31/2004
Graduation Date: 12/31/2005
Skips Dates:

First Name	Last Name	Codes (See Reg.)
Current Student		<input type="checkbox"/> D <input type="checkbox"/> H

Payment

Date:

Customer ID: **Current Student**

Payment is for:

Amount:

Method of Payment:

Check #:

Name on Check:

Dues ClassPmt

Notes or Comments:

CREATING ROSTERS WITH BLANK LINES

You may like to print a “blank” roster for upcoming classes on which you would then “pencil in” your prospective clients. When your enrollment is complete you can then enter the students into the database and print a copy for your instructor.

You may also wish to use a “blank” enrollment for a class to create an additional line on an existing roster to indicate you have room in the class and in which to pencil in a new or transferring student. For example, if you have room for 8 students in class but only 6 are currently enrolled, you may want to add two additional blank enrollments in case you want to add someone to the class after you print the rosters. This is especially good for monthly classes, as students tend to transfer into and out of them at any time.

Adding blank lines to a roster:

- Create the class in the Class Listing
- Go to “View Enrollment Records” and enter the class code at the prompt. The existing enrollment records, if any, will be pulled up.
- Use the “▶*” symbol along the bottom scrolling record selector to go to a new blank record. Enter “.” in the Customer ID field; **TAB** and enter “?” in the Dog Name field. Enter the Class ID code in the proper field. This will result in one “blank” line on the roster.

If you are entering a blank line on a monthly roster, be sure to add an individual start date for the fictitious client.

- If you desire more than one blank line on the roster, you may “copy” and “paste” the blank record multiple times. To accomplish this:
 - Click on the grey bar to the left of the record to select the entire blank record.
 - “**CNTRL-C**” to copy
 - Use the “▶*” symbol along the bottom scrolling record selector to go to a new record
 - Click on the grey bar to the left of the record to select the entire record
 - “**CNTRL-V**” to paste the blank record for the class

Troubleshooting Rosters:

IF AN ENTIRE CLASS IS MISSING FROM THE GROUP OF ROSTERS:

If the roster you wish to view does not appear in the set, check the settings for “Classification” for that class in the Class Information section. That setting, plus the start and end dates, are used to group the classes for the Class Roster section. For instance, in order for a Base class to show up in the “Base Roster” group, the classification for that class must be “B”. Likewise, a monthly class must have a classification of “A” in order to appear in the Monthly Roster grouping.

Check the dates on the class listing. Make sure the dates are correct, especially the year. A “future” base class that has the wrong date may not be considered “future” by the computer. The class you seek may be in the “graduated” classes instead if the date is incorrect.

Check to make sure your computer’s dates are correctly set as well.

TROUBLESHOOTING: MISSING ENTIRE CLASS ROSTER:		
NAME OF FIELD	LOCATION	CHECK FOR
Classification	Class Information	Set to correct grouping
Start Date	Class Information	Check to see if dates are correct
End Date	Class Information	Check to see if dates are correct
Computer’s Date	Lower right of monitor	Check to see if date is correct

IF A CLIENT DOES NOT APPEAR ON THE ROSTER:

Check the Training Record for the client’s dog. Sometimes the wrong Class ID may have been entered, which caused the Training Record to appear on a different roster. Or perhaps the Training Record simply hasn’t been added yet.

Make sure the “Class Status” is set to “Current”

If you are having problems with an advanced class enrollment, make sure there is an “individual start date” listed, but no end date.

TROUBLESHOOTING: MISSING CLIENT FROM ROSTER:		
NAME OF FIELD	LOCATION	CHECK FOR
Class ID	Client’s Training Record	Check for correct Class ID
Class Status	Client’s Training Record	Must be CURRENT
Individual Start Date	Client’s Training Record	Must have a date to appear on monthly roster
Individual End Date	Client’s Training Record	Must be blank to appear on monthly roster.
Status	Client’s Customer Record	Must be CURRENT

Instructor Attendance

If you would like to track your instructor's attendance electronically, you will notice a button with a check mark on the Current Base Rosters as well as on the Graduation Results forms.

That button will bring up an instructor attendance window, shown below.

Instructor Attendance Record for
BEGnow Basic Tuesday 6:15:00 PM

Start Date: 5/31/2006 Graduates: 12/31/2007 Skips Dates:

Instructors: Kim Crenshaw home & fax: 256-859-5909; cell: 256-653-8352; otch@aol.com
Karen Peterlin 883-1020; : karenpeterlin@aol.com

1:	5/31/2006	Karen Peterlin	Kim Crenshaw	Karen Peterlin	Kim Crenshaw	Karen Peterlin
2:	6/7/2006	Kim Crenshaw	Karen Peterlin	Kim Crenshaw	Karen Peterlin	Kim Crenshaw
3:	6/14/2006					Karen Peterlin Kim Crenshaw
4:	6/21/2006					
5:	6/28/2006					
6:	7/5/2006					
7:	7/19/2006					
8:						

The dates for each class are set to default from the start date you entered. You may change them by highlighting the date and typing in the one you want. You might do that if you have skipped a week.

You may select up to five instructors/assistants for each week from a pull-down menu. The list is based on the active instructors you have listed. If you don't see an instructor, check to make sure they are marked "yes" for current.

Lists and Labels

Marketing | Lists | Notes | Details

Obedience Competitive Events
Agility Conformation
Therapy Grooming
Rally Override
Instructor Hide Member since:
Club(s):

Once you have entered your clients' data you can target market groups individual y. You can send out postcards to inform puppy graduates about upcoming Basic classes or Basic graduates to inform them of Intermediate or Agility. Besides using the information you are logging in the Customer Information and Training Records sections, you can target a client to appear on several specific lists, regardless of their class or customer enrollment status. The list section is located in the Customer Information main form. When you open the Customer Info form you will see a tabbed section to your upper right. Marketing is the default tab and you have already logged information in that area. If you use your mouse to click on the other tabs, you will see that you can enter other information about the client in these areas. You can use your mouse to check or un-check as many boxes for lists on which you would like to include the client. Most of them are self-explanatory. The "override" box is to indicate you want the client included on all mailing lists, whether they are an enrolled student or not, and the "hide" button is used to block a client from future mailings, even if they would otherwise qualify due to other criteria. To ensure your client appears on specific "club" lists, put the initials of the school in the first Club field. For instance, you may want to tag the members of your local clubs if you

Students Lists

Lists

Former Students Current Students

Puppy class graduates All Current Students
 All Former Students Enrolled in continuous classes
 Basic/Beginner graduates **Other Lists**
 Former Advanced Students Individuals on Events List
 Intermediate/Subnovice E-Mail Lists Club Roster
graduates Instructors

Hold mouse over buttons to view criteria for inclusion of records included in report

periodically mail information specifically to those trainers.

The List switchboard is accessible via the Customer Records area or choose it from the menu bar.

It is reasonably self-explanatory and provides lists formatting to print on 8.5 x 11 sheets for the information listed below.

The information you will be provided is only as accurate as the data you enter. If you have a student who is appearing on the wrong list, or not on the correct list, evaluate how you have their information listed in the Customer Information section. Also check their "class status" in their dogs' Training Records. The status of the client both in their Customer Record as well as in their Training Record is what dictates their placement on which list.

Club Member Management

The screenshot shows a software window titled "Customer Information Form". At the top, there is a "Close" button and a dropdown menu with "CRENKIM" selected. A yellow banner contains the instruction: "To Display or Add Customer: Click On Arrow in Box at Left; Scroll Down or Type ID#; Enter". Below this, there are tabs for "Mailing Label", "Marketing", "Lists", "Notes", and "Details". The "Customer Information:" section includes fields for "First" (Kim), "Middle", and "Last" (Crenshaw). The "Address:" field contains "114 Season Lane", "Huntsville", "AL", and "35811-9456". "Phone(s); Day:" is "home & fax: 256-859-5909" and "Evening:" is "cell: 256-653-8352". "Fax/Other:" and "E-mail:" are "otch@aol.com". On the right, there are checkboxes for "Obedience", "Agility", "Therapy", "Rally", "Instructor", "Competitive Events", "Conformation", "Grooming", and "Override". Below these is a "Club(s):" field with "CLUB" entered and a "Member since:" field with "12/1/1992". A red circle highlights the "Club(s)" and "Member since:" fields.

You can print out membership rosters for your club, log payments for dues, print mailing labels for members and e-mail lists for members, all as easily as the click of a mouse.

In order for the program to know which of your students are club members, you will need to indicate the acronym for the club in the person's information. For instance, in the sample shown, the club field shows "CLUB". Were this a "real" club, you would enter your initials instead, for instance: BARK or DAWG. In the field to the right of "clubs" there is field in which to enter the date the member joined the club. This will appear on your membership roster.

This screenshot shows the "Notes" and "Breeds" sections of the software. The "Notes:" field is empty. The "Breeds:" field contains the text "Papillon, Labrador Retreiver, Golden Retriever, Shetland". A red circle highlights the "Breeds:" field.

Going to "Notes" in the tabbed section, you will see an area for "breeds". Here you list all the breeds owned by the member. This information will also appear on the membership rosters.

Once all your club members are designated as such, you can update information and it will appear on all of the lists, labels, and membership rosters automatically. The areas in which you will access the club member information is shown on the following page.

Club Member Management

E-Mail Lists

Events List Obedience

Agility List Conformation

Current Advanced Therapy Trainers

Club Members

Capture club member e-mail addresses.

Print mailing labels for club members.

Mailing Labels

Current Students - All Breed Owners

Current Advanced **Club Members**

Events List Instructors

Former Students Clubs on Events List

Former Advanced

Prospective Students

Financial

Reports **Interactive Forms**

Payment report for specified period

Payments by Client

Club Dues Payments

Class Payments for period

Unpaid Enrollments

Payments by Class ID

Log payment for class enrollment

Log payment for club dues

Pay from list of unpaid enrollments

Edit Payments of Zero

Selected records

Log and print report of dues payments.

Produce Club Membership Roster

Students Lists

Lists

Former Students **Current Students**

Puppy class graduates All Current Students

All Former Students Enrolled in continuous classes

Basic/Beginner graduates

Former Advanced Students

Intermediate/Subnovice graduates

Other Lists

Individuals on Events List

E-Mail Lists

Instructors

Club Roster

Hold mouse over buttons to view criteria for inclusion of records included in report

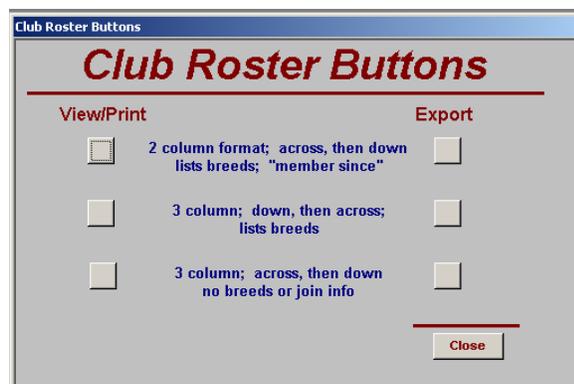
CLUB Membership Roster

Kim Crenshaw
 Member since 12/3/1992
 Breeds: Papillon, Labrador Retriever, Golden Retriever, Shetland Sheepdog, Border Collies
 114 Season Lane
 Huntsville, AL 35811-9466
 home & fax: 256-859-5909 cell: 256-653-8352
 oich@aol.com

Lauren Duckworth
 Member since
 Breeds:
 P.O. Box 127+
 Huntsville, AL 35807
 256-859-5909
 laurenandbrandi@aol.com

Club Membership Rosters

Access club membership rosters from Student Lists, either through Customer Records or through Administration.



You can view, and print from the Training School software, Club membership rosters in several formats. If you like, however, you can export them to a Word file, (choose rtf) so you can modify/edit the information.

CLUB Membership Roster

31-Jan-07

Kim Crenshaw

Member since 12/1/1992
Breeds: Papillon, Labrador Retriever, Golden Retriever, Shetland Sheepdog, Border Collies
114 Season Lane
Huntsville, AL 35811-9456
home & fax: 256-859-5909 cell: 256-653-8352
otch@aol.com

Lauren Duckworth

Member since
Breeds:
P.O. Box 1274
Huntsville, AL 35807
256-859-5909
laurenandbandit@aol.com

CLUB Membership Roster

31-Jan-07

Kim Crenshaw

114 Season Lane
Huntsville, AL 35811-9456
home & fax: 256-859-5909
cell: 256-653-8352
otch@aol.com

Lauren Duckworth

P.O. Box 1274
Huntsville, AL 35807
256-859-5909
laurenandbandit@aol.com

E-mail Lists



Access the E-mail List selection window from Student Lists, either through Customer Records or through Administration.

The E-mail lists, like other lists, produce a group of records based on the information in the client’s Customer Record. If you have checked “obedience” in the tabbed List section, for instance, that client will appear on the e-mail list for Obedience.

CLUB MEMBERS:

You can e-mail all the members of any club. When you click on the button for Club Members, enter the name or acronym for the club (the sample data is “Club”) and it will display the e-mails for all the

	Phone4	LName	FName	Club1
▶	btch@aol.com	Crenshaw	Kim	CLUB
	laurenandbandit@aol.com	Duckworth	Lauren	CLUB
*				

members of that club, as indicated on their customer record form. Simply use your mouse to select all the e-mail addresses, copy and then paste into your e-mail program. Individuals who appear on this list will have:

the club acronym in the first box under “club” in their customer record under “lists” as well as a valid e-mail address in the appropriate location. (An upgrade is being worked on at this time to produce a direct e-mail.)

Mailing Labels

The Labels section works very much the same way as does the Lists section. Clients appear on the labels based on how they are tagged in the Customer Information area and on through their Training Records. You can hover your mouse above the button to see a description of what is included in the set. (see sample)



If you periodically print labels for area breed clubs, you may be interested in the Breed Owners mailing labels. If you plan to target owners of certain breeds, it becomes even more imperative for you and your staff to take care to enter the breeds correctly and with consistent abbreviations when logging clients’ dogs.

Marketing Features

TARGETING PROSPECTIVE CLIENTS

Your staff can use this form when you are trying to fill an upcoming class or simply as a way to follow-up on prior contacts with clients. The way the software determines who to include (and who not to include) is based on the Customer Status (which would **not** be current). When a student enrolls in class, you change the student status to current, so as long as you are up-to-date with logging your registrations, the Prospect form will only pull up potential clients who have not yet registered. The contacts are sorted from most current to oldest.

USING LISTS AND LABELS FOR MARKETING

One of the best uses of the extensive lists and labels groupings is for marketing use. Look around the section for mailing labels, e-mail lists and student lists and you will see you are able to target virtually any segment of your population who has ever inquired about classes and/or has ever been a student. You can send postcards only to Puppy graduates, for example, to target a newly offered Basic class. Or you can send e-mails only to Intermediate graduates to let them know of an opening in a Novice class. These features are designed to reach specific target markets without annoying those to whom the notices would not apply, thus making it much more likely those clients will read your notices. If you are using mail, it saves a great deal of printing and postage to only send information to those who meet the prerequisites for the class being offered.

Quality Control

RETENTION RATE REPORTS

A very nice feature in the Training School Professional is a tool to evaluate the performance of your instructors. We find that being able to review a report such as this, and to share it with the instructors, helps motivate them to keeping up with the students who might miss a class or two and to encourage them to continue training. You will need to develop your own system, but we recommend that only drops that had nothing to do with the program were classified as “excused” drops on the Graduation Results.

Attendance, Graduation and Retention Rates					
Going Back to a Start Date of 1/1/2003 thru classes graduated by 2/1/2004					
<i>For Puppy, Basic and Intermediate Classes only; does not include Advanced classes</i>	Started	Finished	Graduated	Excused Drops	Adjusted Attendance
Kim Crenshaw					
Basic, BCG001, 12/11/2003 thru 12/11/2004	0	0	0	0	0
Intermediate, INT001, 12/11/2003 thru 12/11/2004	0	0	0	0	0
Puppy, PUP001-02, 12/11/2003 thru 12/11/2004	3	1	2	1	3
	3	1	2	1	3
		33%	75%		100%

Therefore, a client whose work schedule changes or who becomes ill will be an excused drop, and you also may find out about it in time to transfer them to another class and keep a client who may end up continuing with your school well beyond the class in which they are currently enrolled. Clients liked to be cared about, and sometimes a simple phone follow-up can mean the difference between them completing their training or not or whether they like your school enough to continue to other levels. The last page of the report will show the school-wide reports. You can print an individual report for each instructor, plus a school-wide copy for comparison purposes. The information on this report is taken from the Graduation Results forms, so the report will only be as current as you are diligent about filing Graduation Results forms.

GRADUATION REPORTS

Graduation Results



Event
Saturday
12:00 PM

PREP5-04
Start Date: **8/30/2004**
Graduated: 9/1/2004
Skipped:
Room: 2

Instructors:
Kim Crenshaw

Open Training Records-Log Grade

# Students ENROLLED	10	# Students Maximum	0
# Students FINISHED	9	% Students Finished	90%
# Students GRADUATED	8	% Students Graduated	80%
# Drops EXPLAINED	1	% Adjusted Attendance	100%

WEEKLY ATTENDANCE:	Wk1:	Wk2:	Wk3:	Wk4:	Wk5:	Wk6:	Wk7:	Wk8:	# Drop s EXPLAINED	% Adjusted Attendance
	10	8	9	7	6	7	8	8	1	100%

Client/Handler Name	Dog's Name	Breed	1	2	3	4	5	6	7	8	Photo	PD	Phone
Seminar Attendee	U H	Obedience Dog	Sieffe	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NOTE: Obedience Trial Preparation Seminar, \$100 per team.

CLASS ATTENDANCE

Opening the Graduation Results will pull up a version of a roster for every class that has graduated. This will include the information from the class roster and reflect all information on your students as currently logged in your system. For instance, if you have already logged a new phone number, the new phone number will appear on the Graduation Results.

In addition to roster information, you have “live” blocks under the week numbers in which to reflect which classes the student attended. This will automatically be transferred to the student’s Enrollment Record, which is accessible via the main Customer Form.

If you have not already done so in preparing the class certificates, you should indicate which students have graduated the class.

Therefore, months later, when your student calls and wants to know if he can go into the next level, you can easily pull up all of his training records. If you have logged the Graduation Results, you can clearly see if the student only attended half the classes and did not, in fact, graduate. This can easily avoid having dogs going into classes for which they are not prepared.

ENROLLMENT TRENDS AND RETENTION TOTALS

The Graduation Results also have a way to track enrollment from a managerial standpoint. Just under the time slot of the class you will see a strip for Weekly Attendance. You can put in the number of dogs who attended each week. This can be useful when tracking retention trends for instructors, or your program as whole, to see where you are losing students. If, for instance, you tend to see a dramatic and consistent drop after week #4 across the board, you may want to evaluate the material for that week. If, for instance, you tend to see a dramatic drop after week #4 for a particular instructor, you may want to observe his class and try to help him solve any problems that might be contributing to that trend. On the right hand side of the form are the totals that, when data is entered, will be transferred to the Instructor Retention reports. Include the number of students who started the class, the number who physically “finished” the course (ie came to all or most of the classes), the number who graduated and are allowed to go to the next level, and the number of “excused” drops.

After you have logged the number of students, and the breakdowns for attendance and drops, you will notice that the software calculates the percentages for you in the boxes to the right. These are the figures that will be transferred to the Instructor Retention Reports.

EXCUSED OR UNEXCUSED?

We define “Excused” drops as those having nothing to do with the program or the instructor. Examples might include: the student or dog were injured or ill; the student or dog died; the student’s work schedule changed, the dog came in season, or other things that were completely out of your control or that of your instructor. An example of an “Unexcused” drop would be that the handler states he wasn’t enjoying the class or that the dog wasn’t enjoying it. Those are the types of things we, as managers, should be concerned with

USING RETENTION RATES TO MOTIVATE YOUR STAFF

Keeping track of drop rates can motivate your staff to do follow-up calls on your students. By knowing that the student dropping will directly affect them, they will do more to find out why the student has dropped and communicate that to you. You might ask your instructors to write that information on the bottom or back of the roster or attach a note. We recommend having the instructor or staff call after the second missed class for sure, if not the first. Often problems with retention can be dealt with when caught early. For instance, a dog coming into heat may be transferred to another class. A student who has clashed with an instructor might be saved to your program by a transfer as well. A schedule change might result in a transfer. These issues are up to you, as the manager, but information is our goal is with these reports.

Another easy way to motivate instructors is to feature the instructor with the highest retention rate on the bulletin board or newsletter each cycle. Or can also bring attention to all instructors who maintain a 100% adjusted graduation rate, thus encouraging all of your instructors to strive to find out why a student has dropped out and to share that information with you.

NOTES

There is an area at the bottom of the report to make notes. This is where I make note of excused absences or explanations of students who did not graduate although they attended all classes.

CHANGING STUDENT'S CLASS STATUS

Just as it is imperative to change a student's status to "current" to ensure he is included on the class roster, it is equally important to change his status after the class has ended. Some reasons why you would want to make sure you do that include:

- If the student is still marked "current", he will be included in marketing materials or mailings (such as newsletters) that are designed to go only to current students.
- If the student is not marked as "graduated" for a class, he will not be included on lists of clients to target for the next level. (ie a list of Puppy grads you may want to mail or e-mail regarding a new Basic class offering).

Changing the class and student status is not difficult and takes on a little extra time, which will greatly pay off in the benefit to you in having your former clients in the right category for marketing purposes.

1. After filling out all of the information you want on the Graduation Results form, print the form if you like.
2. Click on the button at the top which says, "Open Training Records to Log Graduates".

- When you open the form, you will be in the **CUSTOMER STATUS** field. Simply type 'F' to change the status from **CURRENT** to **FORMER**. If you know the student has already enrolled for another class,

you may leave it as Current, but it is best to fault on the side of changing to Former than not, so if you only “think” they are going to continue you should probably change it.

- TAB** to go to the next field, which is the **CLASS STATUS** and change it appropriately. You will have several choices, and, as with all pull down fields, the software will try to match your choice as you type. Under no circumstances should a client’s Class Status be left as **CURRENT** after the class has graduated. Even if the client remains a current student of the school, his enrollment in that particular class is over and should be tagged as one of the other choices.
- TAB** and enter the number of classes the student attended.
- TAB** to go to the **GRADUATED?** Field, which should already have been filled out. Check it now if it should be and has not yet been.
- TAB** again to activate the **NEXT** button
- ENTER** to go to the next record.
- There is an area on the Training Record for notes. This is where you might make a note that the instructor sees signs of increasing dominance, or that the dog is very shy; or any other notation that might be helpful when accessing the dog’s records in the future. Use your mouse to go there.

As you can see, it only takes a few keystrokes to log the graduation information for the client onto their training records, and you will find it an invaluable reference tool to have that information available to you.

Certificates of Graduation and Attendance

Attendance

Certificates are for students who have completed the course but have not met the graduation requirements.

Graduation

Certificates indicate those students those who may continue to next level.

The Sample Data uses the class code: **PUPMON5-04** to view the certificates.



TAGGING STUDENTS FOR CERTIFICATES

To “tag” a student for a graduation certificate, you must mark him as “graduated”, either on the computerized roster or via the client’s training records. The easiest way to tag multiple students is to:

1. Pull up the class roster for the class you are graduating. Most likely this will be located in the “Base Class” section of “Rosters”.
2. Located the desired roster in the set and check off which students are to graduate.
3. Close the form and go to the certificate area.

You can also tag the students for graduation by pulling up the “Enrollment Records” via the “Class Information” section. In that case, you will view one student record at a time and you may check the graduates in the appropriate box.

TROUBLESHOOTING CERTIFICATES

The following problems occasionally occur:

- The software tells you there is no data for the report or pulls up a report with “error” in several places
- The certificates come up, but there is a blank where it should say from which class the student has graduated

The first thing to check if the level of class is blank on the Graduation/Attendance certificates is that the **LEVEL** of your class in the “Class Details” has an exact match in the “Class Descriptions” section. If there is no entry in the “Class Description” form that matches the **LEVEL** of class in the “Class Details” form, there will be no class information on the certificates.

LEVEL in the Class Details is what appears on the roster. **LEVEL** also cross-references for the graduation certificates, so it is important there be an exact “match” in the Class Description area.

Order	Level	Name	Cost	Per	
1	Puppy	Puppy Development Course	\$60.00	6 week course	Designed for young puppies, 10 w
2	Basic	Basic Training Course	\$60.00	8 week course	Home manners, problem solving a
5	Utility	Obedience Competition: Ut			

The information that appears on the certificates is located in the **NAME** field of the “Class Description” form.

have successfully completed
Puppy Development Course
Graduating 7/31/2004

The information that appears on the certificates is located in the **NAME** field of the “Class Description” form.

If this field is blank, there will be no class information on the certificates.

Once you have entered your most common class descriptions you should not experience a problem with the formal level appearing on the certificates.

Consistency in how you refer to your classes will reduce the number of entries you need to make in the Class Description area!

- Attendance Certificates come up fine, but the Graduation Certificates do not.

Check to make that you have students tagged for graduation. If students are not “tagged” as having graduated, there will no graduation certificates.

Adding Veterinarian and Clinics

While you are not required to add any data regarding local Veterinarians or Clinics prior to entering your client's data, having the information already loaded will save time when entering dog information, as you can simply choose a Veterinarian and Clinic from the list, rather than having to type that information for each dog. We recommend using the Last Name first method for Veterinarians. For example: Greg Able should be listed as Able, Greg on the pull-down list. That will make it much faster for you and your staff to enter a veterinarian, especially if you or your client only knows their last name.

ID#	Pre	Name	Clinic	HomeAdd	HomeCity	HomeSt	HomeZip	HomePhc
ABLE	Dr.	Able, Gregg	Chase Animal Hospital		Huntsville	AL		
COMBMEL	Dr.	Combs, Melinda	Winchester Road Animal Hospit		Huntsville	AL		
	Dr.							

Importing Existing Data

IMPORTING DATA FROM ACCESS 2000

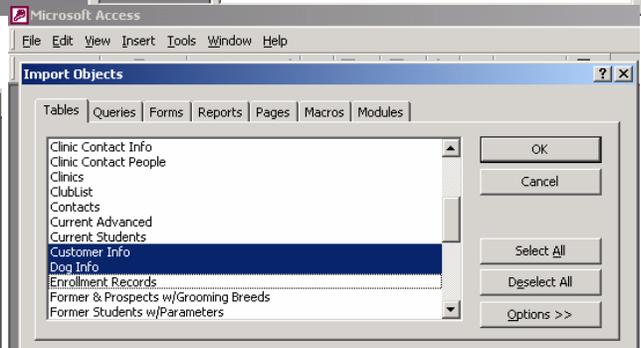
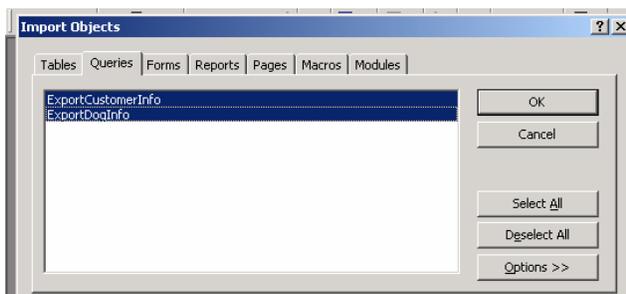
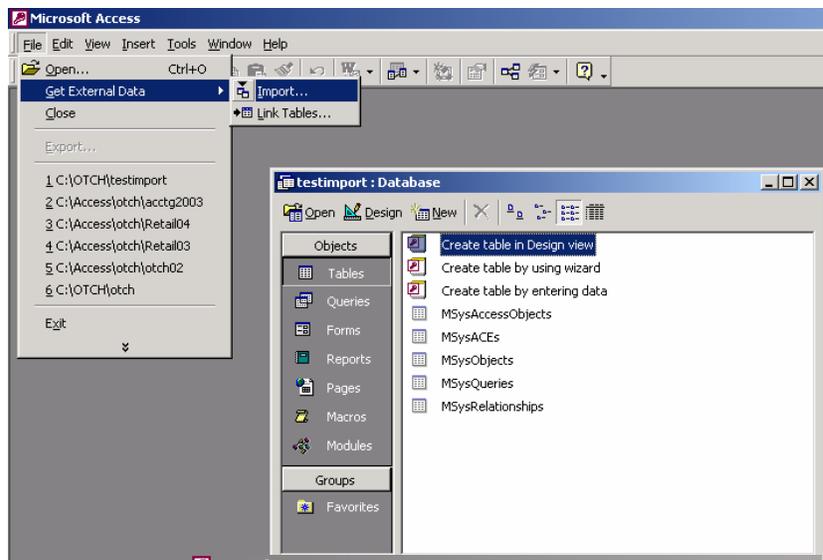
Training School Professional is built on Microsoft Access. If you have Microsoft Access you can import your existing data into Training School Professional. The software was built on 2003 but we have included a framework to import/export using 2000. We will assume if you are attempting to import the data that you are fluent with Access. Kim Crenshaw Enterprises, LLC will be happy to import your data for you if you are not comfortable doing so. Please contact us if you would like us to do that.

Access supports a number of other formats, including text files and Excel files. If you have your data in a format other than Access, import it into an Access database and then export it from there to the Training School Professional. If you have any questions, you may contact us.

You do not have to import/export any data to the Training School Professional for it to function. This is strictly a way for you to retain the data you have accumulated prior to switching to the Training School Professional.

You cannot import data into the Training School Professional software from inside the software. You must open or create another Access database and then export the data into the Training School Professional using the queries provided.

- Open a new database or your existing one.
- Go to “File”; “Get External Data”; “Import”
- If you are using Access 2000, import “C:/otch/data2000.mdb”.
If you are using Access 2003, choose “C:/otch/data.mdb”.
- Scroll down the list of tables and select Customer Info and Dog Info.
- Go to the Queries tab and select the two queries there: the ExportCustomerInfo and the ExportDogInfo.
- Click “okay” to start the import.



Open the Customer Info table. You will be able to see how the information is set up. We will be doing an append query to transfer your data to the new software, so you need to choose which field in your customer information table corresponds with each field in our Customer Info table. It is not necessary to use every field. However, the key field in the table is the ID field and it must be unique. We strongly recommend you read the section in the manual about assigning ID codes before you proceed.

ID	Pre	FName	Mid	LName	Su	Alias	Spouse	Address	City	State	Zip	Phone1
+												
+		Kim		Crenshaw				P.O. Box 1274	Huntsville	AL	35807-0274	256-859-591
+		Current		Student				current address	Huntsville	AL		555-555-12
+		Lauren		Duckworth				P.O. Box 1274	Huntsville	AL	35807	
+		Former		Student				Former address	Huntsville	AL	zip code	day phone
+		Karen		Peterlin				P.O. Box 7458	Huntsville	AL	35807	883-1020
+		Test		Prospect				prospect address	City	AL	zip	day phone
+		Seminar		Attendee				seminar attendee address	state	AL	zip	day phone

- If you do not already have a corresponding ID field in your table, create one now. Basically, you are going to go through and assign a unique ID code for each client you wish to transfer over. We **strongly** recommend it be the first four letters of the client’s last name followed by the first three letters of the client’s first name.

Therefore, in our sample, the Test Customer would be CUSTTES.

#	ID	First	Last	Address	Phone
1		Test	Customer	P.O. Box 1274	256-859-5909

○ Do NOT change any feature in the Customer Info table or the export to the Training School Professional dbase may fail!

- After you have assigned all the clients you wish to transfer an ID code, you can build your append query:
 - Query; new; design view
 - Choose your existing Customer information table; add; close
 - Drag all your fields individually to the grid
 - Query; append query; Append to Customer Info in the current database
 - Choose the corresponding fields to append to
 - Run (red exclamation point)

Field:	#	ID	First	Last	Address	Phone
Table:	TESTCustomer	TESTCustomer	TESTCustomer	TESTCustomer	TESTCustomer	TESTCustomer
Sort:						
Append To:		ID	FName	LName	Address	Phone2
Criteria:						
or:						

If some data did not append properly, you will be notified and it will be placed in a table for paste errors that you will be able to review, adjust and reattempt.

- Close the Query. You can save it as “appendCustomerInfo” if you want to use it again later.
- Go to the Customer Info table and check to see that your data was appended. In the third line of our sample you can see the new CUSTTES was added.

ID	Pre	FName	Mid	LName	Su	Alias	Spouse	Address	City	State	Zip	Phone1	Phone2
+ CRENKIM		Kim		Crenshaw				P. O. Box 1274	Huntsville	AL	35807-0274	256-859-5906	
+ CURRENT		Current		Student				current address	Huntsville	AL		555-555-1212	555-555-1212
+ CUSTTES		Test		Customer				P. O. Box 1274					256-859-5
+ DUCKLAU		Lauren		Duckworth				P. O. Box 1274	Huntsville	AL	35807		256-859-5
+ FORMER		Former		Student				Former address	Huntsville	AL	zip code	day phone	evening pl
+ PETEKAR		Karen		Peterlin				P. O. Box 7458	Huntsville	AL	35807	883-1020	
+ PROSPECT		Test		Prospect				prospect address	City	AL	zip	day phone	Evening p
+ SEMINAR		Seminar		Attendee				seminar attendee address	state	AL	zip	day phone	Evening p

When you have imported all the data you want into the Customer Info table, you can close it and do the same type of append transfer with the Dog Info table, going through the same steps to create an append query from your existing dog information table to the one you imported from data2000.mdb.

IMPORTING FROM AN ACCESS 2000 DATABASE

We have built in two queries to export your data in the Access 2000 database. The queries will export the Dog Info and the Customer Info tables into the Training School Professional software.

After you get all of your old data into those tables to your satisfaction, you can activate the queries to transfer the information by double clicking on them. You must activate the Customer Info first before sending the Dog Info. That is because the dog cannot be in the system without its owner. This will send the information from the 2000 database over to the Training School Professional. As long as you did not change any features on the Customer Info and Dog Info tables, all of the information in those tables should transfer. If you want to make appends to the other tables in the system, you may import those as well and follow the same format in order to upload the new information. If you decide to add more than customer information and dog information, you must adhere to the following order:

○ *You must export the Customer Info table before exporting the Dog Info table*

1. Customer Information
2. Dog Information (dogs cannot be added without their owners)
3. Class information
4. Enrollment information (an enrollment cannot exist for a class that does not exist)

Upgrading From Previous Versions

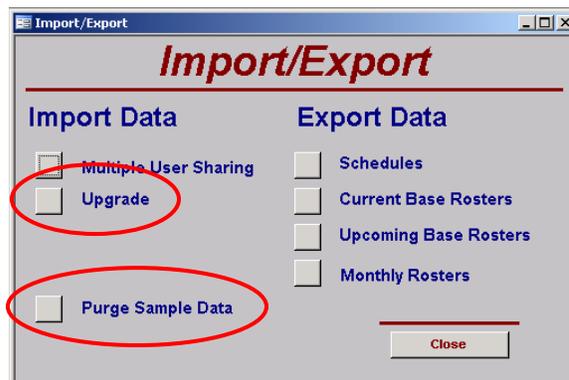
UPGRADING FROM VERSION 4

While there have been major modifications in the software, upgrading from a Version 4 to Version 5 or 6 should not be too difficult.

You will need to get an Activation Code before importing your old data. Without an Activation Code, the software will not allow you to add more than 20 records. Therefore the import will fail. You may want to contact me in advance and let me know when you would like to upgrade so I can be available to give you that information immediately. The Activation Code is dependent on a unique number created by each computer upon loading the software, so it is not possible to acquire the activation code in advance.

Kim Crenshaw. otch@aol.com. 256-859-5909 or (cell) 256-653-8352.

1. Rename the OTCH folder under C://OTCH to OTCH2. (You can rename a folder or file by right-clicking on it in the windows explorer).
2. Use your CD that came with your first installation to un-install the previous version of Training School Professional. (on your computer: "Start Menu"; "Settings"; "Control Panel"; "Add/Remove Programs")
3. Install the new version of Training School Professional.
4. Locate your old data file in the folder you renamed to OTCH2 (data.mdb). Rename the file "data2.mdb". Copy and paste it into the new OTCH folder.
5. Replace the logo.gif file in the OTCH folder with your logo in the OTCH2 folder.
6. E-mail or call Kim Crenshaw on your first open and let me know the Request Code for activation to get your activation code.
7. Enter the Activation Code.
8. Go to the Administrative area and change the name of your school.
9. Go to the Administrative area, then to Import/Export and choose to "Upgrade". The software will automatically upgrade your old data from the data2.mdb file into the new "data.mdb" file.



UPGRADING FROM VERSIONS 5 or 6

The activation code you have already installed also unlocks the upgrade.

Before you install the new files, you will need to take steps to protect your old data from being overwritten during the installation. If you have any doubts about how to do this, please consult a computer person or let me know.

The following procedures need to take place in your C:/OTCH folder **prior** to installing the new files:

1. Delete the file “training.mdb”
2. Delete the file “data2.mdb”, if there you have one with that name.
3. Reame “data.mdb” to “data2.mbd”.
(You can rename a folder or file by right-clicking on it).
4. Place the two new files: “data.mdb” and “training.mdb” into the C:/OTCH folder.
5. Open the software via the icon. Go to the Administrative area, then to Import/Export and choose to “Upgrade”. The software will automatically upgrade your old data from the “data2.mdb” file into the new “data.mdb” file.
6. Spot check to make sure all of your data has been installed into the software. Check a roster or two, a few lists, etc.

Purging Sample Data

While the sample data makes it significantly easier to walk through the tutorial embedded in this manual, and helps you and your staff see what the software can do and how information is grouped, at some point we realize you will no longer need the sample data. In fact, as you acquire plenty of data of your own the presence of the sample data will be a nuisance.

In the Administrative area is a button that will activate a purge of the sample data included with your software. It will only delete the sample data – none of the data you have inputted will be affected.

Networking

Training School Professional, version 5, supports networking. The files included with the standard installation software will be located on your server, or host computer. You will need to get a workstation version to install on your other networked stations. Installing the regular version on a remote computer, even if they are connected, will not result in network sharing as only the workstation version tells the software to seek the data on the host computer. You will need a separate activation code for each computer running the software.

MAPPING YOUR DRIVE

If you are setting up a network version of Training School Professional, we will assume you already have a network situation and are familiar with how to map drives. Map a drive from your workstation to the C drive on your host computer and name that connection “SERVER”. The workstation version will attempt to connect to the host through this path. If the path is not established in this way, the workstation version will not be able to access the data it needs to function.

TROUBLESHOOTING THE NETWORK CONNECTION

If your remote computer will not allow you to establish a connection to the Server’s C drive, go to the C drive on the host computer through “My Computer”. Right click on the C drive to show properties and set the Sharing function to “share”. This allows other computers to access the information on your C drive.

Synchronizing Data in a Multiple User Environment

INSTALLING THE SOFTWARE ON MULTIPLE COMPUTERS

On installation, the Training School Professional creates a number unique to the computer on which it is being installed. You will not be allowed to add more than 20 records until you enter the Activation Code. Your purchase of Training School Professional will allow you three installs in order for multiple people in your club to access the information on their computers. If you are networking, you will need to install the workstation version on your networked computers.

TRUE SYNCHRONIZATION

The Training School Professional software supports synchronization through the Windows Briefcase. It also can be synchronized and replicated through the Access 2003 synchronization and replication tools. If you want to utilize those tools the file you will need to replicate and synchronize is: c://otch/data.mdb. Synchronization and replication significantly enlarges the size of the file. However, in Synchronization, modifications can be made to all records and merged back together, whereas in the import method described below only new records can be brought in to the main system.

IMPORTING NEW DATA FROM OTHER USERS

Many users may choose to periodically import data from other files. This is significantly easier for those who are not proficient with Windows Briefcase or Access replication and synchronization.

If you are in an environment where several people combine to produce all the records needed, we have provided an avenue to share the database and then join it back together.

The easiest way to share the data is to agree which person will be accessing what records. The import data feature does **not** support modifications to existing data and will only bring in completely new records from the files that others work on and then bring back to import into the main software. Any **changes** to existing data (such as an address change or updating a vaccination record on an existing dog) will not be imported using this method. However, **new** data will be imported. (ie: adding a client and/or their dog)

For instance: this is how a club might split up some of the duties and then regularly (weekly?) meet at the location of the main database to synchronize their data.

PERSON 1	PERSON 2	PERSON 3
Obedience Director	Fields public phone calls and add customers, contacts and dogs for those.	Agility Director
Schedules all obedience	Prints single labels for mail	Schedules all agility

classes	outs to prospects	classes.
Adds registrations for advanced classes	Adds enrollment for puppy/basic and intermediate classes	Adds records for agility enrollments.
Makes modifications in existing data (ie logs graduates and changes phone numbers/addresses)		

Upgrade to Version 7

It's been a great three years for Training School Professional and I appreciate everyone's feedback on how to improve the software. We have incorporated virtually all of the requests from our users in Version 7. Please find enclosed your upgrade. As in the past, there is no charge for the upgrade and again we thank you for the feedback that has led to the exciting modifications.

Among the updates include:

- Additional of financial capabilities
 - Reports of unpaid enrollments
 - Reports of club dues payments
 - Reports of class payments
- Support of multiple users; importing data from other computers
- Supports networking with the addition of workstation software on the remote computer(s).
- Supports export of Schedules and Rosters to a variety of formats
 - Html; to post to your website
 - Text files & snapshots – to e-mail to others
- Clients can now change their own school name and logo
- Purge sample data when you no longer need it for the tutorial
- Additional support for Clubs tied in together (see pages 36 & 37):
 - Club dues payments and reports of same
 - Club Membership Rosters
 - Club member mailing labels
 - Club member e-mail lists

You will also notice other changes as well. Keep those comments coming! The new manual is on the CD and will be installed in the OTCH folder. It is also available on the website (www.otch.com). As always, if you have any questions or problems, please don't hesitate to contact me.

Please make sure to read the directions BEFORE installing the software upgrade! You MUST move your data file and rename it before installing or the new files may be loaded on top of your old data and erase it! To be safe, make sure you make a copy of the data.mdb file and move it to another folder before beginning the upgrade. Please contact me if you have any questions about upgrading.

Thanks,

Kim Crenshaw
256-859-5909 (land and fax); 256-653-8352 (cell)
otch@aol.com

Upgrade to Version 7.1

RELEASE DATE 1-31-07 NEW FEATURES:

- Electronic attendance for instructors
- Multiple versions of club membership rosters – two and three columns, with and without extra data.
- Export features for club membership rosters into Word (rtf).

UPGRADING FROM VERSIONS 5, 6 or 7.0

The activation code you have already installed also unlocks the upgrade.

Before you install the new files, you will need to take steps to protect your old data from being overwritten during the installation. If you have any doubts about how to do this, please consult a computer person or let me know.

The following procedures need to take place in your C:/OTCH folder **prior** to installing the new files:

7. Delete the file “training.mdb”
8. Delete the file “data2.mdb”, if you have it.
9. Rename “data.mdb” to “data2.mbd”.
10. Place the two new files: “data.mdb” and “training.mdb” into the C:/OTCH folder.
11. Open the software via the icon. Go to the Administrative area, then to Import/Export and choose to “Upgrade”. The software will automatically upgrade your old data from the “data2.mdb” file into the new “data.mdb” file.
12. Spot check to make sure all of your data has been installed into the software. Check a roster or two, a few lists, etc.

Thanks,

Kim Crenshaw
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otch@aol.com